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# HELENA, MONTANA ECONOMIC GROWTH STUDY



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HELENA, MONTANA, ECONOMIC GROWTH STUDY

Prepared for the  
State of Montana  
Department of Highways  
Planning and Research Bureau  
in cooperation with the  
U.S. Department of Transportation  
Federal Highway Administration

by the  
Bureau of Business and Economic Research  
School of Business Administration  
University of Montana  
Missoula, Montana

1974



## PREFACE

This economic growth study of the Helena area was prepared by the Bureau of Business and Economic Research, University of Montana, for the State of Montana, Department of Highways, Planning and Research Bureau, in accordance with Contract No. F-DP-249(31), dated August 10, 1973.

The Federal Aid Highway Act of 1970 authorizes demonstration programs in conjunction with the development of federal aid highways in economic growth centers. Part of this program calls for economic studies to evaluate the effects of highway improvements and related investments on the growth center. Helena has been designated an economic growth center in Montana; therefore, any future primary system highway improvements in the Helena area need to be evaluated in terms of their probable economic effect on the growth center area.

The demonstration program contemplates two studies: a before-phase, to establish the various base data and reference lines, and an after-phase, to note and report changes from the previously established bases and attempt to relate those changes to the highway improvement activities in the area. This report presents the data and the analysis of the before-phase study of the Helena economic growth center area.

The opinions, findings, and conclusions expressed in this publication are those of the authors and not necessarily those of the State of Montana-Department of Highways or the Federal Highway Administration.



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## THE HELENA AREA ECONOMY TODAY

The Helena economic growth center, as defined by the Montana Department of Highways includes all the land area within a four-mile radius of the city of Helena. It is located at the southern end of Lewis and Clark County and was reported to have had a population of about 26,400 in 1970.<sup>1</sup> The Helena trade area has been defined as including all of Lewis and Clark County plus all of Broadwater County (to the southeast), the Avon-Elliston census division of Powell County (to the southwest), and the Boulder census division of Jefferson County (to the south).<sup>2</sup> The population of the entire Helena trade area was slightly over 40,000 in 1970, a 16 percent increase from the 34,630 persons reported in 1960:<sup>3</sup>

	<u>1960</u>	<u>1970</u>
Helena trade area, total	34,630	40,175
Lewis and Clark County	28,006	33,281
Broadwater County	2,804	2,526
Avon-Elliston division (Powell County)	1,217	1,018
Boulder division (Jefferson County)	2,603	3,350

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<sup>1</sup>Montana Department of Highways, "Helena, Montana, An Economic Growth Center," (Helena, Montana, May 1972), p. 3.

<sup>2</sup>John R. Borchert and Russell B. Adams, *Trade Centers and Trade Areas of the Upper Midwest*, Urban Report Number 3, Upper Midwest Study (Minneapolis, Minnesota, 1963), p. 7.

<sup>3</sup>U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1970, Characteristics of the Population, Montana*, vol. 1, pt. 28 (Washington, D.C.: U.S. Government Printing Office, 1973), table 10, pp. 28-13 to 28-15. Comparable figures for the divisions are not available for 1950.



Although the entire trade area constituted slightly less than 6 percent of Montana's population in 1970 (and about 5 percent in 1960), it accounted for about 28 percent of the population increase in the state during the 1960s.<sup>4</sup>

Unfortunately, there is a paucity of historical data for areas below the county level, such as the Avon-Elleston and Boulder census divisions referred to above. Because of this, it is necessary to limit the presentation in this report to Lewis and Clark and Broadwater counties; from now on, they will be referred to as the impact area. Since U.S. Highway 12, leading from Helena west toward Garrison and Missoula and east toward Townsend, is the Federal Aid Primary highway in the Helena area that is most likely to receive future improvements, it makes sense to include Broadwater County in the impact area along with Lewis and Clark County. Unfortunately, the exclusion of the Avon-Elleston and Boulder areas omits approximately 11 percent of the trade area's population, and the Boulder area is experiencing considerable population growth.<sup>5</sup>

Lewis and Clark and Broadwater counties make up an area which is hardly homogeneous. Lewis and Clark is largely urban; its chief activity is government, and it is an area which has been growing rather rapidly. Broadwater, on the other hand, is rural; its population is equal to only 7 percent of the two-county area. Between 1950 and 1970, its population declined steadily although there is some indication that this trend may have been reversed in recent years (table 1). Events in Broadwater

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<sup>4</sup>*Ibid.*, derived.

<sup>5</sup>*Ibid.*



Table 1

Total Resident Population in Montana  
and the Helena Impact Area  
1950, 1960, and 1970-1973

	<u>1950</u>	<u>1960</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
Montana	591,024	674,767	694,409	710,000	716,000	721,000
Helena impact area	27,462	30,810	35,807	36,800	37,400	38,200
Lewis and Clark County	24,540	28,006	33,281	34,200	34,800	35,500
Helena	17,581	20,227	22,730	NA	NA	NA
Broadwater County	2,922	2,804	2,526	2,600	2,600	2,700

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, Number of Inhabitants, Montana*, P-A26 (Washington, D.C.: U.S. Government Printing Office, 1951), table 5, p. 26-8; *idem*, *U.S. Census of Population: 1970, Number of Inhabitants, Montana*, PC(1)-A28 (Washington, D.C.: U.S. Government Printing Office, 1970), table 10, pp. 28-13 and 28-14; *idem*, "Estimates of the Population of Montana Counties, July 1, 1971 and July 1, 1972," *Current Population Reports*, Series P-26, no. 19 (Washington, D.C., 1973), p. 2; and *idem*, "Estimates of the Population of Montana Counties and Metropolitan Areas: July 1, 1972 and July 1, 1973," *Current Population Reports*, Series P-26, no. 53 (Washington, D.C., 1974), table 1, p. 3.

Notes: The data for 1950, 1960, and 1970 are complete census counts as of April 1, while the data for 1971, 1972, and 1973 are estimates as of July 1; the 1973 estimates are provisional. NA denotes that intercensal population estimates are not available for the city of Helena.





County have little effect on population, employment, and income figures for the two-county impact area. Nevertheless, Broadwater has strong economic and transportation ties to Helena and Lewis and Clark County.

### Population

The two-county Helena impact area, like the Helena trade area, represented a very small portion of the state's population in 1950, 1960, and 1970 (roughly 5 percent each year). During the 1950s, the impact area experienced a 12 percent increase in population, nearly equalling the state's 14 percent gain. During the decade from 1960 to 1970, the two counties as a whole grew more rapidly--by 16 percent--while the state's population growth fell off sharply (to about 3 percent). The increase in the Helena impact area accounted for one-fourth of the total population increase experienced in the state during the sixties (table 1).

Within the impact area itself, rural Broadwater County experienced declines in its population that were more than offset by the large increases in Lewis and Clark County, one of only fifteen counties in the state to experience a population increase during the 1960s.<sup>6</sup> While the bulk of the county's increases in the 1950s and 1960s occurred in Helena itself, considerable growth was also recorded from 1960 to 1970 for the Helena west division, in the southwestern area of the county, through part of which U.S. Highway 12 runs.<sup>7</sup>

The city of Helena, which comprises the entire urban area of both Lewis and Clark County and the impact area as a whole, has recorded population increases in every census since 1940 (with only slight increases

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<sup>6</sup>*Ibid.*

<sup>7</sup>*Ibid.*, p. 28-14.



attributed to the annexation of surrounding areas). Between 1950 and 1970, it increased by 29 percent, with a slightly greater increase during the 1950s. Helena has also accounted for over 60 percent of the population in the two-county impact area and in Lewis and Clark County in each of the three latest censuses (table 1). The proportionately smaller rural population, however, has also been increasing: in Lewis and Clark County, the rural population increased by slightly over 50 percent between 1950 and 1970, with the greatest growth occurring in the 1960s. This growth was sufficient to offset the population decline in rural Broadwater County; thus the rural population in the impact area as a whole also grew--by 32 percent (tables 2-4). This growth was slightly faster than that experienced by the urban area, so a slightly larger proportion of the population was found in the rural area in 1970 than in 1950 (tables 2 and 3). This increase in the rural population of Lewis and Clark County, and the impact area as a whole, reflects a movement of residents to outlying rural areas adjacent to Helena.

Within Lewis and Clark County, during the 1950s and 1960s, there has been population growth north of Helena in the Helena valley going up about halfway to Wolf Creek; this growth is expected to continue. The area adjacent to the west city limits of Helena, in the general area along the route of U.S. 12, is expected to be the other area experiencing the most growth in the next twenty years. More recent developments in the general Helena area have included a couple of planned unit developments in the southeast corner of the area, east of Interstate 15. Some of this development has moved over the county line into the Boulder



Table 2

Characteristics of the Population  
Helena Impact Area  
1950, 1960, and 1970

	<u>1950</u>	<u>1960</u>	<u>1970</u>
Total population	27,462	30,810	35,807
Residence			
Urban <sup>a</sup>	17,581	20,227	22,730
Rural	9,881	10,583	13,077
Nonfarm	6,842	8,254	11,028
Farm	3,039	2,329	2,049
Race			
White	26,981	30,319	35,129
Indian	329	368	508
Other	152	123	170
Sex			
Male	13,872	15,244	17,370
Female	13,590	15,566	18,437
Age			
Under 20 years	9,174	12,130	14,212
20-64 years	15,798	15,474	17,977
65 years and over	2,490	3,206	3,618

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, General Characteristics, Montana*, P-B26 (Washington, D.C.: U.S. Government Printing Office, 1952), tables 41, 42, and 47-49, pp. 26-48, 26-52, 26-58, 26-59, 26-74, 26-75, 26-76, 26-79, and 26-80.

*Idem*, *U.S. Census of Population: 1960, General Population Characteristics, Montana*, PC(1)-28B (Washington, D.C.: U.S. Government Printing Office, 1961), tables 27 and 28, pp. 28-49, 28-55, 28-64, and 28-65; and *General Social and Economic Characteristics, Montana*, PC(1)-28C (Washington, D.C.: U.S. Government Printing Office, 1961), table 91, pp. 28-160 and 28-162.

*Idem*, *U.S. Census of Population: 1970, Characteristics of the Population, Montana*, vol. 1, pt. 28 (Washington, D.C.: U.S. Government Printing Office, 1973), tables 34, 35, 134, and 136, pp. 28-64, 28-66, 28-72, 28-235, 28-237, 28-245, and 28-247.

Note: The Helena impact area includes Lewis and Clark and Broadwater counties.

<sup>a</sup>The city of Helena constitutes the entire urban area of the impact area.



Table 3  
 Characteristics of the Population  
 Lewis and Clark County  
 1950, 1960, and 1970

	<u>1950</u>	<u>1960</u>	<u>1970</u>
Total population	24,540	28,006	33,281
Residence			
Urban <sup>a</sup>	17,581	20,227	22,730
Rural	6,959	7,779	10,551
Nonfarm	5,117	6,253	8,935
Farm	1,842	1,526	1,616
Race			
White	24,071	27,516	32,626
Indian	317	368	486
Other	152	122	169
Sex			
Male	12,317	13,735	16,092
Female	12,223	14,271	17,189
Age			
Under 20 years	8,089	10,963	13,218
20-64 years	14,226	14,159	16,765
65 years and over	2,225	2,884	3,298
Median age	32.0	30.1	27.9

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, General Characteristics, Montana*, P-B26 (Washington, D.C.: U.S. Government Printing Office, 1952), tables 12, 41, 42, and 47-49, pp. 26-20, 26-48, 26-52, 26-58, 26-59, 26-74, 26-75, 26-76, 26-79, and 26-80.

*Idem*, *U.S. Census of Population: 1960, General Population Characteristics, Montana*, PC(1)-28B (Washington, D.C.: U.S. Government Printing Office, 1961), tables 27 and 28, pp. 28-49, 28-55, 28-64, and 28-65; and *General Social and Economic Characteristics, Montana*, PC(1)-28C (Washington, D.C.: U.S. Government Printing Office, 1961), table 91, pp. 28-160 and 28-162.

*Idem*, *U.S. Census of Population: 1970, Characteristics of the Population, Montana*, vol. 1, pt. 28 (Washington, D.C.: U.S. Government Printing Office, 1973), tables 34, 35, 134, and 136, pp. 28-64, 28-66, 28-72, 28-235, 28-237, 28-245, and 28-247.

<sup>a</sup>The city of Helena constitutes the entire urban area of the county.





Table 4  
 Characteristics of the Population  
 City of Helena  
 1950, 1960, and 1970

	<u>1950</u>	<u>1960</u>	<u>1970</u>
Total population	17,581	20,227	22,730
Race			
White	17,282	19,887	22,310
Indian	299	231	307
Other		109	113
Sex			
Male	8,442	9,816	10,770
Female	9,139	10,411	11,960
Age			
Under 20 years	5,619	7,741	8,927
20-64 years	10,326	10,365	11,431
65 years and over	1,636	2,121	2,372
Median age	32.2	30.5	27.6

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, General Characteristics, Montana*, P-B26 (Washington, D.C.: U.S. Government Printing Office, 1952), tables 10 and 33, pp. 26-19 and 26-37; *idem*, *U.S. Census of Population: 1960, General Population Characteristics, Montana*, PC(1)-28B (Washington, D.C.: U.S. Government Printing Office, 1961), tables 20 and 21, pp. 28-34 and 28-36; and *idem*, *U.S. Census of Population: 1970, Characteristics of the Population, Montana*, vol. 1, pt. 28 (Washington, D.C.: U.S. Government Printing Office, 1973), tables 27 and 28, pp. 28-53 and 28-54.



division of rural Jefferson County.<sup>8</sup> In the last several years, there has been a noticeable movement of Helena workers to communities (such as Clancy) in this rural area along the interstate. This can be seen in the considerable population growth in the Boulder division (excluding the town of Boulder itself) from 1960 to 1970--almost 800 persons, or 66 percent, during the decade.<sup>9</sup>

U.S. Census Bureau population estimates for 1971, 1972, and 1973 (provisional) show continued increases for the impact area, with its population increasing at a somewhat faster pace than the state's population (7 percent, compared to about 4 percent). Within the impact area, Lewis and Clark continues to maintain the major portion of this growth. Contrary to past trends, however, these estimates also indicate a slight increase for Broadwater--about 8 percent, or about 200 persons, from 1970 to 1973 (table 1).

Although it is much too early to tell, it may well be that the slight population increase shown for Broadwater County from 1970 to 1973 is reflecting a movement of Helena workers to this rural county area. There evidently has been some such tendency recently, albeit very slight: one residential subdivision has been platted and some construction already completed north of Townsend along U.S. 12. There are also a number of Townsend residents (estimated at 40-60 persons) who work in

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<sup>8</sup>City-County Planning Department, *City of Helena and Jurisdictional Area, Population Projections 1968-1990* (Helena, Montana, July 1969), p. 11; and Peter Lenmark, City-County Planning Department (Helena, Montana), telephone conversation (January 1974).

<sup>9</sup>U.S. Department of Commerce, *U.S. Census of Population: 1970*, table 10, p. 28-14.



the Helena area.<sup>10</sup> The 1970 census reported that 79 workers from Broadwater, 9 percent of all workers in the county, worked outside their county of residence; it's quite likely that many, if not all, of these persons worked in Helena.<sup>11</sup> In addition, some provisional estimates for 1973 from the Census Bureau Population Division indicate that Broadwater has experienced some net immigration since 1970--roughly 100 persons between 1970 and 1973.<sup>12</sup> Perhaps this is an indication that Broadwater may experience some population increase due to the residential relocation of Helena workers similar to that seen in Jefferson County.

Some of the overall growth in population in the impact area has been the result of net immigration. Net migration calculations compare population change and anticipated natural increase (excess of births over deaths) over a given period of time. Net immigration is indicated when the population increase exceeds the natural increase; if, however, the population declines or the increase is less than the natural increase, net outmigration is indicated. Most Montana counties, as well as the state itself, experienced net outmigration during the 1950s and 1960s. The Helena impact area followed this trend during the 1950s, showing net outmigration of almost 700 persons, a rate slightly over 2 percent but below that for the state. From 1960 to 1970, however, the impact area

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<sup>10</sup>William Kearns, State Bank of Townsend (Townsend, Montana), telephone conversation (January 1974).

<sup>11</sup>U.S. Department of Commerce, *U.S. Census of Population: 1970*, table 119, p. 28-196.

<sup>12</sup>U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of the Census, "Estimates of the Population of Montana Counties and Metropolitan Areas: July 1, 1972 and 1973," *Current Population Reports*, Series P-26, no. 53 (Washington, D.C., table 1, p. 3).



reversed that trend and reported net immigration of over 1,200 persons, or 4 percent of its 1960 population (table 5). This immigration during the 1960s was solely the result of growth in Lewis and Clark County. Although Lewis and Clark County experienced a small net outmigration between 1950 and 1960 (less than 1 percent), it was one of only ten counties in the state to experience net immigration between 1960 and 1970--almost 1,700 persons, or 6 percent of its 1960 population (table 6).<sup>13</sup> This immigration during the 1960s was great enough to offset its own slight outmigration during the 1950s and that of Broadwater County so as to result in net immigration for the entire impact area from 1950 to 1970--all while the state as a whole continued to experience considerable net outmigration.

#### Labor Force

Population changes in an area often reflect changes in the labor force of the area. From 1950 to 1970, while the population of the Helena impact area increased by about 8,300 persons (30 percent) and the number of persons of labor force age, as defined by the U.S. Bureau of the Census, increased by almost 4,000 (19 percent), the number of persons actually in the labor force increased by over 3,500, or 29 percent

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<sup>13</sup>U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population and Housing: 1970, General Demographic Trends for Metropolitan Areas, 1960 to 1970, Montana*, PHC(2)-28 (Washington, D.C.: U.S. Government Printing Office, 1971), table 3, pp. 28-10 and 28-11.





Table 5

Net Migration of the Population, Helena Impact Area  
1950-1970

	<u>1950-1960</u>	<u>1960-1970</u>	<u>1950-1970</u>
Population change			
Population at end of period	30,810	35,807	35,807
Population at beginning of period	<u>27,462</u>	<u>30,810</u>	<u>27,462</u>
Net population change during period	3,348	4,997	8,345
Less: Natural increase (excess of births over deaths)			
Births during period	7,294	7,226	14,520
Deaths during period	<u>3,256</u>	<u>3,480</u>	<u>6,736</u>
Natural increase during period	4,038	3,746	7,784
Net migration during period	-690	1,251	561
Migration rate (percent) <sup>a</sup>	-2.5	4.1	2.0

Sources: U.S. Department of Commerce, Bureau of the Census, "Components of Population Change, 1950 to 1960, for Counties, Standard Metropolitan Statistical Areas, State Economic Areas, and Economic Subregions," *Current Population Reports*, Series P-23, no. 7 (Washington, D.C.: U.S. Government Printing Office, 1962), table 1, pp. 37 and 38; and *idem*, *U.S. Census of Population and Housing: 1970, General Demographic Trends for Metropolitan Areas, 1960 to 1970, Montana*, PHC(2)-28 (Washington, D.C.: U.S. Government Printing Office, 1971), table 3, p. 28-10.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. Negative net migration figures and migration rates indicate net outmigration from the area.

<sup>a</sup>The migration rate is expressed as a percentage of the population at the beginning of the period.



Table 6

Net Migration of the Population, Lewis and Clark County  
1950-1970

	<u>1950-1960</u>	<u>1960-1970</u>	<u>1950-1970</u>
Population change			
Population at end of period	28,006	33,281	33,281
Population at beginning of period	<u>24,540</u>	<u>28,006</u>	<u>24,540</u>
Net population change during period	3,466	5,275	8,741
Less: Natural increase (excess of births over deaths)			
Births during period	6,585	6,759	13,344
Deaths during period	<u>2,944</u>	<u>3,180</u>	<u>6,124</u>
Natural increase during period	3,641	3,579	7,220
Net migration during period	-175	1,696	1,521
<i>Migration rate (percent)<sup>a</sup></i>	-0.7	6.1	6.8

Sources: U.S. Department of Commerce, Bureau of the Census, "Components of Population Change, 1950 to 1960, for Counties, Standard Metropolitan Statistical Areas, State Economic Areas, and Economic Subregions." *Current Population Reports*, Series P-23, no. 7 (Washington, D.C.: U.S. Government Printing Office, 1962), table 1, pp. 37 and 38; and *idem*, *U.S. Census of Population and Housing: 1970, General Demographic Trends for Metropolitan Areas, 1960 to 1970, Montana*, PHC(2)-28 (Washington, D.C.: U.S. Government Printing Office, 1971), table 3, p. 28-10.

Note: Negative net migration figures and migration rates indicate net outmigration from the county.

<sup>a</sup>The migration rate is expressed as a percentage of the population at the beginning of the period.



(tables 1 and 7).<sup>14</sup> This was a very rapid increase by Montana standards; during the same two decades the state labor force grew by only 17 percent.<sup>15</sup>

Most of the impact area's growth occurred during the 1960s, when a 17 percent increase, representing over 2,200 persons, was recorded (table 7). As was the case with the population growth, Lewis and Clark County accounted for all the labor force increase in the two-county impact area from 1950 to 1970, more than offsetting the decline that occurred in Broadwater County. The increase in Lewis and Clark County amounted to some 3,800 persons (35 percent), over half of whom lived in Helena (tables 8 and 9).

These labor force figures refer to the census data presented in tables 7, 8, and 9. Unfortunately, such data, or even comparable data, are not available for counties or states for intercensal years. Similar data on the civilian labor force, however, are available on an annual basis since the 1970 census from the Employment Security Division (ESD)

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<sup>14</sup>The 1950, 1960, and 1970 figures (from tables 7-9) are not strictly comparable. Census data for 1950 and 1960 on employment status related to persons fourteen years old and over, while the 1970 census data related to persons sixteen years old and over, with only limited detail available for fourteen- and fifteen-year-olds. The Census Bureau made this change so as to conform to the official measurement of the labor force as revised in 1967. The exclusion of the fourteen- and fifteen-year-olds in the 1970 data does not seriously distort the data because as a group they constitute only a small portion of the whole--e.g., in the impact area, in 1970, they represented less than 2 percent of all employed persons fourteen and over. However, 1970 detail for fourteen- and fifteen-year-olds has been included wherever possible (e.g., in tables 12, 14, and 15). *Ibid.*, tables 35 and 123, pp. 28-66, 28-72, 28-216, 28-218.

<sup>15</sup>U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, General Characteristics, Montana*, P-B26 (Washington, D.C.: U.S. Government Printing Office, 1952), table 25, p. 26-30; *idem*, *U.S. Census of Population: 1970*, table 46, p. 28-113. The state data, in this instance, include fourteen- and fifteen-year-olds.



Table 7

Employment Status of the Population, by Sex, in the Helena Impact Area  
1950, 1960, and 1970

	1950			1960			1970		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Persons of labor force age <sup>a</sup>	10,414	10,087	20,501	10,525	11,040	21,565	11,685	12,795	24,480
In labor force	8,441	3,661	12,102	8,352	5,038	13,390	9,209	6,462	15,671
Percentage of total	61.1	36.3	59.0	79.4	45.6	62.1	78.8	50.5	64.0
In civilian labor force	8,409	3,660	12,069	8,324	5,038	13,362	9,168	6,462	15,630
Employed	8,126	3,583	11,709	7,881	4,834	12,715	8,716	5,160	14,876
Unemployed	283	77	360	443	204	647	452	302	754
Percentage of total civilian labor force	3.4	2.1	3.0	5.3	4.0	4.8	4.9	4.7	4.8
Not in labor force	1,973	6,426	8,399	2,173	6,002	8,175	2,476	6,333	8,809

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population, 1950, General Demographic Statistics*, Montana, P-826 (Washington, D.C.: U.S. Government Printing Office, 1952), table 43, pt. 26-63 and 26-64; *U.S. Census of Population, 1960, General Demographic Statistics*, Montana, PC(1)-280 (Washington, D.C.: U.S. Government Printing Office, 1961), table 83, pp. 28-136 and 28-138; and *U.S. Census of Population, 1970, General Demographic Statistics*, Montana, PC(1)-280 (Washington, D.C.: U.S. Government Printing Office, 1973), table 121, pp. 28-205 and 28-203.

Note: The Helena impact area includes Lewis and Clark and Broadwater counties.

<sup>a</sup>Census data for 1950 and 1960 on employment status related to persons fourteen years old and over, while the 1970 census data related to persons sixteen years old and over, with only limited detail available for fourteen- and fifteen-year-olds. The Bureau of the Census made this change so as to conform to the official measurement of the labor force as revised in 1967. Thus, in the very strictest sense, the data for 1950 and 1960 are not exactly comparable with the 1970 data.





Table 8

Employment Status of the Population, by Sex, in Lewis and Clark County  
1950, 1960, and 1970

	1950			1960			1970		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Persons of labor force age <sup>a</sup>	9,276	9,155	18,431	9,508	10,158	19,666	10,812	11,965	22,777
In labor force	7,497	3,406	10,903	7,586	4,801	12,387	8,586	6,165	14,751
Percentage of total	80.8	37.2	59.2	79.8	47.3	63.0	79.4	51.6	59.9
In civilian labor force	7,467	3,405	10,872	7,562	4,801	12,363	8,545	6,165	14,710
Employed	7,203	3,334	10,537	7,145	4,601	11,746	8,108	5,881	13,989
Unemployed	264	71	335	417	200	617	437	284	721
Percentage of total civilian labor force	3.5	2.1	3.1	5.5	4.2	5.0	5.1	4.6	4.9
Not in labor force	1,779	5,749	7,528	1,922	5,357	7,279	2,226	5,800	8,026

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Employment and Unemployment, 1950*, p. 826 (Washington, D.C.: U.S. Government Printing Office, 1952), table 43, p. 26-66; *idem*, *U.S. Census of Employment and Unemployment, 1960*, p. 826 (Washington, D.C.: U.S. Government Printing Office, 1961), table 43, p. 26-66; *idem*, *U.S. Census of Employment and Unemployment, 1970*, p. 826 (Washington, D.C.: U.S. Government Printing Office, 1973), table 121, p. 28-208.

<sup>a</sup>Census data for 1950 and 1960 on employment status related to persons fourteen years old and over, while the 1970 census data related to persons sixteen years old and over, with only limited detail available for fourteen- and fifteen-year-olds. The Bureau of the Census made this change so as to conform to the official measurement of the labor force as revised in 1967. Thus, in the very strictest sense, the data for 1950 and 1960 are not exactly comparable with the 1970 data.



Table 9  
Employment Status of the Population, by Sex, in the City of Helena  
1950, 1960, and 1970

	1950			1960			1970		
	Male	Female		Male	Female		Male	Female	
		Total			Total			Total	
Persons of labor force age <sup>a</sup>	6,337	6,948	13,285	6,787	7,514	14,301	7,305	8,436	15,741
In labor force	5,224	2,858	8,082	5,451	3,813	9,264	5,753	4,583	10,336
Percentage of total	82.4	41.1	60.8	80.3	50.7	64.8	78.8	54.3	68.7
In civilian labor force	5,197	2,857	8,054	5,435	3,813	9,248	5,717	4,583	10,300
Employed	5,023	2,798	7,821	5,146	3,665	8,811	5,463	4,379	9,842
Unemployed	174	59	233	289	148	437	254	204	458
Percentage of total civilian labor force	3.3	2.1	2.9	5.2	3.9	4.7	4.4	4.8	4.4
Not in labor force	1,113	4,090	5,203	1,336	3,701	5,037	1,552	3,853	5,405

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, General Characteristics*, vol. 1, pt. 1, p. 826 (Washington, D.C.: U.S. Government Printing Office, 1952), table 35, p. 26-41; *idem*, *U.S. Census of Population: 1960, General Social and Economic Characteristics, Montana, PC(1)-28C* (Washington, D.C.: U.S. Government Printing Office, 1961), table 72, p. 28-123; and *idem*, *U.S. Census of Population: 1970, Characteristics of the Population, Montana, vol. 1, pt. 28* (Washington, D.C.: U.S. Government Printing Office, 1973), table 104, p. 28-182.

<sup>a</sup> Census data for 1950 and 1960 on employment status related to persons fourteen years old and over, while the 1970 census data related to persons sixteen years old and over, with only limited detail available for fourteen- and fifteen-year-olds. The Bureau of the Census made this change so as to conform to the official measurement of the labor force as revised in 1967. Thus, in the very strictest sense, the data for 1950 and 1960 are not exactly comparable with the 1970 data.



of the Montana Department of Labor and Industry. Although these data are not strictly comparable with the census data, they are more current and can indicate any significant changes that might have occurred since 1970. The ESD data on the civilian labor force, like the census data, relate to employed and unemployed persons by their place of residence rather than their place of work.

The ESD data for 1970, 1971, and 1972, presented in tables 10 and 11, indicate an increase in the civilian labor force of the two-county impact area. The 1970-1972 growth represents an increase of almost 1,000 persons, all of which was accounted for by steady growth among Lewis and Clark County residents. Broadwater County, on the other hand, has shown erratic change since 1970--dropping by about 70 in 1971 and then increasing by about 60 in 1972, resulting in an overall decline of about 10 persons between 1970 and 1972.<sup>16</sup>

The most significant change in the labor force status of the population since 1950 has been the increase in numbers of women at work or seeking work. In each of the three areas--the two-county impact area, Lewis and Clark County, and Helena--over 70 percent of the growth in the civilian labor force was attributable to increased numbers of women in the labor force (tables 7, 8, and 9). While only 36 percent of working age females in the two-county impact area were in the labor force in 1950, by 1970 over 50 percent were. As a result, the overall labor force participation rate increased from 59 to 64 percent (table 7). Not surprisingly, total participation rates were somewhat higher in both Lewis and

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<sup>16</sup>Montana Department of Labor and Industry, Employment Security Division, unpublished data (Helena, Montana).



Table 10  
Civilian Labor Force Estimates in the Helena Impact Area  
1970-1972

	<u>1970</u>	<u>1971</u>	<u>1972</u>
Civilian labor force	16,510	16,580	17,490
Employed	15,540	15,590	16,540
Unemployed	970	990	940
<i>Percentage of labor force</i>	<i>5.9</i>	<i>6.0</i>	<i>5.4</i>

Source: Montana Department of Labor and Industry, Employment Security Division, unpublished data (Helena, Montana).

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties.

These estimates are annual averages of the number of persons sixteen years of age and over and defined as employed or unemployed, excluding members of the armed forces.

Although the Lewis and Clark County series was begun in 1969, the Broadwater County series did not begin until 1970; therefore, no 1969 data are presented for the impact area.





Table 11  
Civilian Labor Force Estimates in Lewis and Clark County  
1969-1972

	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>
Civilian labor force	14,520	15,410	15,550	16,400
Employed	13,760	14,490	14,600	15,500
Unemployed	760	920	950	890
<i>Percentage of labor force</i>	<i>5.2</i>	<i>6.0</i>	<i>6.1</i>	<i>5.4</i>

Source: Montana Department of Labor and Industry, Employment Security Division, unpublished data (Helena, Montana).

Note: These estimates are annual averages of the number of persons sixteen years of age and over and defined as employed or unemployed, excluding members of the armed forces. This particular series was begun in 1969 for Lewis and Clark County.



Clark County and the city of Helena (tables 8, 9); state government offices provide large numbers of the clerical jobs traditionally filled by women. No doubt for the same reason labor force participation rates for women in Lewis and Clark County exceed those of all other Montana counties.<sup>17</sup>

Employment. Over 3,100 more persons were employed in the Helena impact area by 1970 than were employed twenty years earlier, with the bulk of the growth occurring between 1960 and 1970 (table 7). In percentages, the increase amounted to 27 percent, almost twice the statewide gain of 14 percent.<sup>18</sup> Not many areas of the state equalled the Helena impact area's performance.

All of this growth was the result of Lewis and Clark County's increased civilian employed labor force: it grew by almost 3,500 persons, or one-third, over the two decades, more than offsetting the decline in Broadwater County. Over half the growth was accounted for by Helena residents (tables 8 and 9).

Women workers accounted for most of the increased employment in the two-county impact area; their numbers grew from 3,583 in 1950 to 6,160 in 1970, or 72 percent. The number of employed men in the area declined between 1950 and 1960, but increased during the next ten years, reflecting the strength of the Lewis and Clark County job market (table 7). Rural Broadwater County, on the other hand, suffered a sharp decline--approximately one-third--in the number of male workers over the twenty-year

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<sup>17</sup>U.S. Department of Commerce, *U.S. Census of Population: 1970*, table 44, p. 28-111.

<sup>18</sup>*Ibid.*, table 47, p. 28-114; and *idem*, *U.S. Census of Population: 1950*, table 25, p. 26-30.



period.<sup>19</sup> The state of Montana since 1950 has experienced a slow continuous decline in male employment, amounting to 5 percent between 1950 and 1970.<sup>20</sup>

The predominant activity in the Helena impact area is government. The city of Helena is the state capital and state government is the area's major industry. Because state and federal officials and agencies located in Helena provide services for the entire state, government is properly classified as a basic, export industry. As government activity and employment increases, other (secondary) industries expand to serve it and its employees.

Unfortunately, the importance of government is understated in the census data on employment by industry in table 12 because the Census Bureau classifies government workers in the industry category related to their work. Thus, most employees of the Department of Health would be classified under health services rather than government. However, the census does provide a separate total for all government workers, and in 1970 they numbered over 4,700 in the impact area, or 31 percent of total employment (tables 12, 13).

Employment figures confirm that it is government activity which has made Helena a growth center: of the 3,438 new jobs filled in the impact area between 1950 and 1970, government (local, state, and federal combined) provided over 2,100, or 62 percent of them (tables 12, 13); most of these jobs were with state agencies. Nearly all the other new employment

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<sup>19</sup>U.S. Department of Commerce, *U.S. Census of Population: 1950*, table 43, p. 26-63; *idem*, *U.S. Census of Population: 1970*, table 121, p. 28-206.

<sup>20</sup>U.S. Department of Commerce, *U.S. Census of Population: 1950*, table 30, p. 26-33; *idem*, *U.S. Census of Population: 1970*, table 47, p. 28-114.



Table 12

Civilian Employed Labor Force, by Industry, in the Helena Impact Area  
1950, 1960, and 1970

	1950	1960	1970
Agriculture	1,402	1,049	910
Forestry and fisheries	31	49	85
Mining	211	112	88
Construction	1,135	1,031	1,370
Manufacturing	994	1,039	906
Lumber and wood products and furniture	146	163	204
Food and kindred products	153	212	207
Printing, publishing, and allied industries	150	196	133
All other	543	468	362
Transportation, communications, and public utilities	1,182	1,157	1,135
Railroads and railway express service	414	237	130
Other transportation	204	145	176
Communications	357	632	606
Utilities and sanitary services	207	143	223
Trade	2,101	2,278	2,850
Wholesale trade	213	253	479
Retail trade	1,888	2,025	2,371
Food stores	321	286	377
Eating and drinking places	528	461	616
All other retail trade	1,039	1,278	1,378
Finance, insurance, and real estate	609	821	894
Services	2,099	2,792	3,755
Personal services	582	783	572
Health services <sup>a</sup>	590	542	1,133
Education and kindred services (private)	151	229	640
All other	776	1,238	1,410
Government	1,831	2,164	2,914
Education	324	488	745
Public administration	1,507	1,676	2,169
Other (industry not reported)	114	223	240
Total employed	11,709	12,715	15,147

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, General Characteristics, Montana*, P-826 (Washington, D.C.: U.S. Government Printing Office, 1952), table 43, pp. 26-63 and 26-66; *idem*, *U.S. Census of Population: 1960, General Social and Economic Characteristics, Montana*, PC(1)-28C (Washington, D.C.: U.S. Government Printing Office, 1961), table 85, pp. 28-146 and 28-148; and *idem*, *U.S. Census of Population: 1970, General Social and Economic Characteristics, Montana*, PC(1)-C28 (Washington, D.C.: U.S. Government Printing Office, 1971), tables 121 and 123, pp. 28-206, 28-208, 28-216, and 28-218.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. These employment data are for persons fourteen years of age and over; thus the total employment figure for 1970 is not strictly comparable with the employment total in table 7.

Because of Census Bureau classification procedures, some government employees (e.g., U.S. Forest Service personnel) are not classified as such but are instead included in the industry category related to their work (e.g., forestry and fisheries). Therefore, government employment is somewhat understated and there is some overstatement in other industry categories.

<sup>a</sup>The 1950 and 1960 data are for hospitals only; other health services (e.g., physicians, dental, nursing, etc.) were included in the "all other" category. The 1970 figure reflects all health services, and the substantial increase between 1960 and 1970 is largely the result of reclassification rather than actual employment increase.





Table 13

Government Workers in the Helena Impact Area,  
Lewis and Clark County, and the City of Helena  
1950, 1960, and 1970

	<u>1950</u>	<u>1960</u>	<u>1970</u>
Helena impact area	2,640	3,189	4,762
Lewis and Clark County	2,511	3,040	4,602
Helena	2,089	2,409	3,379

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, General Characteristics, Montana*, P-B26 (Washington, D.C.: U.S. Government Printing Office, 1952), tables 39 and 43, pp. 26-45, 26-63, and 26-66; *idem*, *U.S. Census of Population: 1960, General Social and Economic Characteristics, Montana*, PC(1)-28C (Washington, D.C.: U.S. Government Printing Office, 1961), tables 74 and 84, pp. 28-124, 28-141, and 28-143; and *idem*, *U.S. Census of Population: 1970, Characteristics of the Population, Montana*, vol. 1, pt. 28 (Washington, D.C.: U.S. Government Printing Office, 1973), tables 104 and 121, pp. 28-182, 28-206, and 28-208.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. The 1950 and 1960 data relate to persons fourteen years of age and over and the 1970 data relate to persons sixteen years of age and over (revised to conform to the official measurement of the labor force as revised in 1967), thus they are not strictly comparable. They are also not comparable to the government data in tables 12, 14, and 15 because they are derived from the census "class of worker" breakdown, for which no industry detail is available.



Table 14

Civilian Employed Labor Force, by Industry, in Lewis and Clark County  
1950, 1960, and 1970

	1950	1960	1970
Agriculture	889	725	641
Forestry and fisheries	27	39	70
Mining	172	66	83
Construction	1,058	978	1,333
Manufacturing	952	959	813
Lumber and wood products and furniture	132	125	121
Food and kindred products	148	188	207
Printing, publishing, and allied industries	146	182	123
All other	526	464	352
Transportation, communications, and public utilities	1,089	1,107	1,105
Railroads and railway express service	378	219	121
Other transportation	173	142	162
Communications	349	607	603
Utilities and sanitary services	189	139	219
Trade	1,944	2,092	2,683
Wholesale trade	198	225	473
Retail trade	1,746	1,867	2,210
Food stores	302	278	357
Eating and drinking places	473	421	559
All other	971	1,168	1,294
Finance, insurance, and real estate	588	813	876
Services	1,964	2,696	3,604
Personal services	532	747	550
Health services <sup>a</sup>	559	518	1,081
Education and kindred services (private)	148	229	614
All other	725	1,202	1,359
Government	1,752	2,048	2,802
Education	279	428	713
Public administration	1,473	1,620	2,089
Other (industry not reported)	111	223	216
Total employed	10,537	11,746	14,226

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, General Characteristics, Montana*, P-B26 (Washington, D.C.: U.S. Government Printing Office, 1952), table 43, p. 26-66; *idem*, *U.S. Census of Population: 1960, General Social and Economic Characteristics, Montana*, PC(1)-28C (Washington, D.C.: U.S. Government Printing Office, 1961), table 85, p. 28-148; and *idem*, *U.S. Census of Population: 1970, General Social and Economic Characteristics, Montana*, PC(1)-C28 (Washington, D.C.: U.S. Government Printing Office, 1971), tables 121 and 123, pp. 28-208 and 28-218.

Notes: These employment data are for persons fourteen years of age and over, thus the total employment figure for 1970 is not strictly comparable with the employment total in table 8.

Because of Census Bureau classification procedures, some government employees (e.g., U.S. Forest Service personnel) are not classified as such but are instead included in the industry category related to their work (e.g., forestry and fisheries). Therefore, government employment is somewhat understated and there is some overstatement in other industry categories.

<sup>a</sup>The 1950 and 1960 data are for hospitals only; other health services (e.g., physicians, dental, nursing, etc.) were included in the "all other" category. The 1970 figure reflects all health services, and the substantial increase between 1960 and 1970 is largely the result of reclassification rather than actual employment increase.



Table 15

Civilian Employed Labor Force, by Industry, in the City of Helena  
1950, 1960, and 1970

	1950	1960	1970
Agriculture	87	86	87
Forestry and fisheries	20	17	32
Mining	65	27	32
Construction	773	758	810
Manufacturing	578	612	490
Lumber and wood products and furniture	56	31	47
Food and kindred products	126	155	135
Printing, publishing, and allied industries	137	162	96
All other	259	264	212
Transportation, communications, and public utilities	922	886	811
Railroads and railway express service	316	181	97
Other transportation	156	99	120
Communications	325	529	460
Utilities and sanitary services	125	77	134
Trade	1,609	1,610	1,955
Wholesale trade	180	183	347
Retail trade	1,429	1,427	1,608
Food stores	244	244	248
Eating and drinking places	377	254	428
All other	808	949	932
Finance, insurance, and real estate services	555	709	662
Personal services	439	586	427
Health services <sup>a</sup>	454	397	807
Education and kindred services (private)	133	202	338
All other	598	1,055	1,355
Government	1,527	1,668	2,040
Education	219	354	554
Public administration	1,308	1,314	1,486
Other (industry not reported)	61	188	158
<b>Total employed</b>	<b>7,821</b>	<b>8,811</b>	<b>10,004</b>

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1960, General Characteristics, Montana*, P-B26 (Washington, D.C.: U.S. Government Printing Office, 1952), table 35, p. 26-41; *idem*, *U.S. Census of Population: 1960, General Social and Economic Characteristics, Montana*, PC(1)-28C (Washington, D.C.: U.S. Government Printing Office, 1961), table 75, p. 28-125; and *idem*, *U.S. Census of Population: 1970, Characteristics of the Population, Montana*, vol. 1, pt. 28 (Washington, D.C.: U.S. Government Printing Office, 1973), tables 104 and 106, pp. 28-182 and 28-184.

Notes: These employment data are for persons fourteen years of age and over; thus the total employment figure for 1970 is not strictly comparable with the employment total in table 9.

Because of Census Bureau classification procedures, some government employees (e.g., U.S. Forest Service personnel) are not classified as such but are instead included in the industry category related to their work (e.g., forestry and fisheries). Therefore, government employment is somewhat understated and there is some overstatement in other industry categories.

<sup>a</sup>The 1950 and 1960 data are for hospitals only; other health services (e.g., physicians, dental, nursing, etc.) were included in the "all other" category. The 1970 figure reflects all health services, and the substantial increase between 1960 and 1970 is largely the result of reclassification rather than actual employment increase.



occurred in the trade and service industries, primarily, as well as in finance and construction (table 12). These activities have expanded, of course, to serve government agencies and the growing local population plus the increased number of visitors attracted to Helena by an expanded and more activist state government as well as by its historic and scenic attractions.

Having discussed the impact of government, there is little else to say. Other industries generally regarded as the export industries which create growth--agriculture, mining, manufacturing, and railroads--all had considerably fewer employees in 1970 than in 1950. The most severe decline, of course, occurred in agriculture, with half the loss experienced in Broadwater County. However, that small county did record an increase in manufacturing employment of from 42 to 93 workers, mostly in wood products, between 1950 and 1970 while the entire impact area's manufacturing employment was declining.<sup>21</sup>

As was pointed out earlier, census data such as those in tables 12 through 15 are not available for intercensal years. Similar data on employment by industry are available, however, from the Regional Economics Information System (REIS) of the U.S. Department of Commerce, Bureau of Economic Analysis. This is a relatively new series of annual data for counties which goes back only to 1967. It is not comparable to census data primarily because persons with more than one job are counted in each job, while the Census Bureau counts such persons only once and classifies them according to the job where they worked the most hours; also the

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<sup>21</sup>U.S. Department of Commerce, *U.S. Census of Population: 1950*, table 43, p. 26-63; and *idem*, *U.S. Census of Population: 1970*, table 123, p. 28-216.





REIS series relates to the numbers of employed persons by place of work rather than by place of residence. Thus, the REIS figures would tend to be considerably higher than the census data. They are more accurately described as a measure of the number of jobs, while the census data measure the number of people at work. The REIS data are introduced here because they will be available on an annual basis in coming years.

The figures for 1967-1971 show changes similar to those indicated by the census data for the 1950-1970 period: significant increases in the government (most especially state government), trade, and services sectors and declines in agriculture and the transportation, communications, and public utilities sector (table 16).

Census figures on the distribution of employment by occupation contain few surprises. Reflecting the impact area's dependence upon government and related activities, workers are concentrated in the professional, clerical, and service groups. These groups, together with nonfarm managers and administrators, also showed the largest percent gains between 1950 and 1970. As industries such as manufacturing, railroads, and agriculture declined in importance, blue collar types--craftsmen, operatives, and laborers--and farm managers and workers declined in numbers (tables 18, 19, 20). And not unexpectedly, male workers in the impact area are most often employed in professional, managerial, and craftsmen occupations whereas women are predominantly found in the clerical and service positions, with some increase recorded also among those in professional positions.

Unemployment. As the impact area labor force grew during the fifties and sixties, so did employment, but not quite as rapidly overall; thus the number of unemployed also increased. Nevertheless,



Table 16  
Employment by Type and Broad Industrial Sector  
Helena Impact Area  
1967-1971

	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>
Total employment	16,284	16,570	17,204	17,626	18,241
Proprietors	2,003	2,017	2,141	2,154	2,162
Farm	622	626	630	624	611
Nonfarm	1,381	1,391	1,511	1,530	1,551
Wage and salary employment <sup>a</sup>	14,281	14,553	15,063	15,472	16,079
Farm	579	497	490	487	535
Nonfarm	13,702	14,056	14,573	14,985	15,544
Government	4,881	5,132	5,270	5,536	5,706
Federal	1,173	1,152	1,191	1,199	1,185
Civilian	1,143	1,121	1,151	1,171	1,157
Military	30	31	30	28	28
State and local	3,708	3,980	4,089	4,337	4,521
Private nonfarm	8,821	8,924	9,303	9,449	9,838
Manufacturing	934	881	958	1,052	998
Mining	29	30	NA	NA	NA
Construction	675	586	628	784	736
Transportation, communica-					
tions, and public					
utilities	1,316	1,327	1,293	1,172	1,146
Trade	2,041	2,061	2,300	2,402	2,555
Finance, insurance, and					
real estate	830	891	903	NA	NA
Services	2,990	3,139	3,124	3,056	3,378
Other	6	9	NA	NA	NA

Source: U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, Regional Economics Information System, unpublished data (Washington, D.C., October 1973).

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. NA denotes that the figure for the impact area is not available because the data are not available for one or both of the counties that make up the impact area; the data are, however, included in the totals.

<sup>a</sup>Full- and part-time employment.



Table 17  
Employment by Type and Broad Industrial Sector  
Lewis and Clark County  
1967-1971

	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>
Total employment	15,213	15,511	16,152	16,564	17,130
Proprietors	1,630	1,646	1,745	1,752	1,764
Farm	380	385	390	385	377
Nonfarm	1,250	1,261	1,355	1,367	1,387
Wage and salary employment <sup>a</sup>	13,583	13,865	14,407	14,812	15,366
Farm	367	315	311	309	339
Nonfarm	13,216	13,550	14,096	14,503	15,027
Government	4,724	4,970	5,113	5,376	5,540
Federal	1,146	1,120	1,153	1,175	1,161
Civilian	1,120	1,093	1,127	1,151	1,137
Military	26	27	26	24	24
State and local	3,578	3,850	3,960	4,201	4,379
Private nonfarm	8,492	8,580	8,983	9,127	9,487
Manufacturing	870	813	929	983	904
Mining	20	25	0	0	0
Construction	664	577	623	776	725
Transportation, communi- cations, and public utilities	1,297	1,309	1,275	1,155	1,131
Trade	1,907	1,927	2,182	2,279	2,430
Finance, insurance, and real estate	821	881	893	929	973
Services	2,907	3,039	3,029	2,972	3,294
Other	6	9	0	0	0

Source: U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, Regional Economics Information System, unpublished data (Washington, D.C., October 1973).

Note: D denotes that the data were withheld to avoid disclosure for individual firms; the data are, however, included in the totals.

<sup>a</sup>Full- and part-time employment.



Table 18  
Civilian Employed Persons, by Occupation and Sex, Helena Impact Area  
1950, 1960, and 1970

	1950			1960			1970		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Professional, technical, and kindred workers	940	528	1,468	1,283	669	1,952	1,898	1,077	2,975
Health practitioners <sup>a</sup>	NA	NA	NA	NA	NA	NA	98	--	98
Nurses	NA	NA	NA	149	254	403	--	188	188
Health workers, except practitioners and nurses	NA	NA	NA	82	218	300	70	94	164
Teachers	NA	NA	NA	245	--	245	147	362	509
Technicians, except health <sup>b</sup>	NA	NA	NA	807	197	1,004	538	20	568
All other professional workers	940	528	1,468	1,334	30	1,364	1,404	44	1,448
Managers and administrators, except farm	592	197	789	1,128	264	1,392	1,035	413	1,448
Sales workers	474	285	759	449	289	738	1,403	285	1,688
Retail trade	NA	NA	NA	202	269	471	460	292	752
Other than retail trade	NA	NA	NA	247	20	267	206	235	441
Clerical and kindred workers	742	1,501	2,243	647	2,041	2,688	737	2,893	3,630
Craftsmen, foremen, and kindred workers	1,399	43	1,442	1,334	30	1,364	1,404	44	1,448
Operatives and kindred workers	1,084	140	1,224	818	175	993	947	130	1,077
Laborers, except farm	593 <sup>c</sup>	11 <sup>c</sup>	604 <sup>c</sup>	546 <sup>c</sup>	11 <sup>c</sup>	557 <sup>c</sup>	497	40	537
Farm laborers and farm foremen	688	21	709	446	15	461	375	--	375
Service workers	574	103	677	455	58	513	340	117	457
Private household workers	622	731	1,353	620	1,147	1,767	664	1,355	2,019
Cleaning service workers	7	178	185	8	297	305	--	180	180
Food service workers	NA	NA	NA	NA	NA	NA	205	155	360
Health service workers	NA	NA	NA	140	359	499	179	502	681
Personal service workers	NA	NA	NA	NA	NA	NA	23	197	220
Protective service workers <sup>d</sup>	NA	NA	NA	91	--	91	70	217	287
All other service workers	615	553	1,168	381	491	872	124	5	129
Occupation not reported	48	43	91	155	135	290	63	39	102
Total employed persons	8,126	3,583	11,709	7,891	4,834	12,715	8,693	6,244	15,147

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1950, General Statistics*, Washington, D.C.: U.S. Government Printing Office, 1952), table 43, pp. 26-63 and 26-66; *Idem*, *U.S. Census of Population: 1960, General Statistics*, Washington, D.C.: U.S. Government Printing Office, 1961), table 84, pp. 28-141 and 28-143; and *Idem*, *U.S. Census of Population: 1970, General Statistics*, Washington, D.C.: U.S. Government Printing Office, 1973), table 122, pp. 28-211 and 28-213.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. NA denotes that the figure for the impact area is not available because the data are not available for one or both of the two counties making up the impact area; the data are, however, included in the "all other" category (where appropriate) and the total for the occupational category.

<sup>a</sup>Physicians, dentists, and related practitioners.

<sup>b</sup>Includes mine laborers who are included in operatives category.

<sup>c</sup>Includes engineers.

<sup>d</sup>Firemen, security guards, policemen, etc.





Table 19  
Civilian Employed Persons, by Occupation and Sex, in Lewis and Clark Count  
1950, 1960, and 1970

	1950			1960			1970		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Professional, technical, and kindred workers	903	486	1,389	1,228	626	1,854	1,797	1,023	2,820
Health practitioners <sup>a</sup>	NA	NA	NA	NA	NA	NA	74	--	74
Nurses	NA	NA	NA	NA	NA	NA	74	--	74
Health workers, except practitioners and nurses	NA	NA	NA	137	243	380	70	94	164
Teachers	NA	NA	NA	75	186	261	135	331	466
Technicians, except health <sup>b</sup>	NA	NA	NA	245	--	245	528	20	548
All other professional workers	903	486	1,389	771	197	968	990	407	1,397
Managers and administrators, except farm	928	187	1,115	1,071	256	1,327	1,384	262	1,646
Sales workers	447	249	696	428	264	692	454	272	726
Retail trade	NA	NA	NA	185	248	433	206	222	428
Other than retail trade	NA	NA	NA	243	16	259	248	50	298
Clerical and kindred workers	718	1,452	2,170	635	1,979	2,614	722	2,798	3,520
Craftsmen, foremen, and kindred workers	1,297	39	1,336	1,203	30	1,239	1,330	41	1,371
Operatives and kindred workers	1,006	125	1,131	740	157	897	892	126	1,018
Laborers, except farm	517 <sup>c</sup>	116	633	503 <sup>c</sup>	116	619	456	37	493
Farm laborers and farm managers	358	19	377	304	8	312	240	--	240
Farm laborers and farm foremen	396	65	461	292	54	346	245	103	348
Service workers	586	659	1,245	584	1,081	1,665	637	1,282	1,919
Private household workers	7	156	163	8	288	296	--	174	174
Cleaning service workers	NA	NA	NA	NA	NA	NA	NA	150	150
Food service workers	NA	NA	NA	129	330	459	171	457	628
Health service workers	NA	NA	NA	NA	NA	NA	23	193	216
Personal service workers	NA	NA	NA	NA	NA	NA	65	214	279
Protective service workers <sup>d</sup>	NA	NA	NA	87	--	87	117	5	122
All other service workers	579	503	1,082	360	463	823	63	84	152
Occupation not reported	47	42	89	151	135	286	94	21	115
Total employed persons	7,203	3,334	10,537	7,145	4,601	11,746	8,261	5,365	14,226

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Populations, 1960*, General Characteristics, Part 1, P-826 (Washington, D.C.: U.S. Government Printing Office, 1952), table 43, p. 26-66; *idem*, *U.S. Census of Population, 1960*, General Social and Economic Characteristics, Part 2, P-826 (Washington, D.C.: U.S. Government Printing Office, 1961), table 80, p. 28-143; and 1950, *U.S. Census of Population, 1950*, General Characteristics, Part 1, P-826 (Washington, D.C.: U.S. Government Printing Office, 1953), table 122, p. 24-213.

NA denotes that the data are not available; the data are, however, included in the "all other" category (where appropriate) and the total for the occupational category.

<sup>a</sup>Physicians, dentists, and related practitioners.

<sup>b</sup>Includes engineers.

<sup>c</sup>Excludes mine laborers who are included in operatives category.

<sup>d</sup>Firemen, security guards, policemen, etc.



Table 20

Civilian Employed Persons, by Occupation and Sex, in the City of Helena  
1950, 1960, and 1970

	1950			1960			1970		
	Male	Female	Total	Male	Female	Total	Male	Female	Total
Professional, technical, and kindred workers	775	413	1,188	1,080	538	1,618	1,442	836	2,278
Health practitioners <sup>a</sup>	NA	NA	NA	NA	NA	NA	69	--	69
Nurses	NA	NA	NA	121	210	330	--	112	112
Health workers, except practitioners and nurses	NA	NA	NA	NA	NA	NA	65	33	98
Teachers	NA	NA	NA	62	155	217	93	274	367
Technicians, except health <sup>b</sup>	NA	NA	NA	217	--	217	411	14	425
All other professional workers	775	413	1,188	680	164	844	804	347	1,151
Managers and administrators, except farm	782	157	939	933	201	1,134	1,002	207	1,209
Sales workers	406	198	604	359	197	556	375	195	570
Retail trade	NA	NA	NA	148	185	333	165	167	332
Other than retail trade	NA	NA	NA	211	12	223	210	28	238
Clerical and kindred workers	635	1,342	1,977	519	1,649	2,208	566	2,125	2,691
Craftsmen, foremen, and kindred workers	953	35	988	859	23	882	741	32	773
Operatives and kindred workers	615	95	710	498	118	616	503	63	566
Laborers, except farm	335	60	395	287	116	403	288	23	311
Farmers, except farm	17	5	22	16	4	20	20	--	20
Farm laborers and farm foremen	44	8	52	37	9	46	39	4	43
Service workers	433	517	950	464	763	1,224	532	924	1,456
Private household workers	3	124	127	8	215	223	--	125	125
Cleaning service workers	NA	NA	NA	NA	NA	NA	167	116	283
Food service workers	NA	NA	NA	78	211	289	149	324	473
Health service workers	NA	NA	NA	NA	NA	NA	15	13	28
Personal service workers	NA	NA	NA	NA	NA	NA	60	16	76
Protective service workers <sup>c</sup>	NA	NA	NA	NA	NA	NA	100	--	100
All other service workers	430	314	744	408	40	448	44	2	46
Occupation not reported	28	22	50	124	110	234	24	14	38
Total employed persons	5,023	2,749	7,772	5,744	3,558	9,302	5,646	4,435	10,081

Sources: U.S. Department of Commerce, Bureau of the Census, *1950 Census of Population, 1950, General Statistical Tables*, H-226 (Washington, D.C.: U.S. Government Printing Office, 1952), table 35, p. 26-41; *idem*, *1960 Census of Population, 1960, General Statistical Tables*, H-226 (Washington, D.C.: U.S. Government Printing Office, 1961), table 74, p. 28-124; and *idem*, *1970 Census of Population, 1970, General Statistical Tables*, H-226 (Washington, D.C.: U.S. Government Printing Office, 1973), table 105, p. 28-183.

NA denotes that the data are not available; the data are, however, included in the "all other" category (where appropriate) and the total for the occupational category.

<sup>a</sup>Physicians, dentists, and related practitioners.

<sup>b</sup>Includes engineers.

<sup>c</sup>Excludes mine laborers who are included in operatives category.

<sup>d</sup>Firemen, security guards, policemen, etc.



unemployment in the Helena impact area appears to be generally lower than in the state as a whole. The census reported only 3 percent of the labor force unemployed in April 1950 and 4.8 percent in the same month in 1960 and 1970 (table 7). These figures may be compared to state unemployed rates of 5.1 percent in 1950, 6.8 percent in 1960, and 6.3 percent in 1970.<sup>22</sup>

The Employment Security Division estimates on unemployment for Lewis and Clark and the two-county impact area are higher than what the census data show, primarily because of differences in measurement procedures. They also indicate somewhat erratic changes between 1970 and 1972, making it difficult to identify a post-1970 trend. Again, the 1970-1972 unemployment rates for both the impact area and its component counties are significantly lower than for the state as a whole, especially in Broadwater County:<sup>23</sup>

	<u>1970</u>	<u>1971</u>	<u>1972</u>
Montana	6.6%	6.9%	6.2%
Helena impact area	5.9	6.0	5.4
Lewis and Clark County	6.0	6.1	5.4
Broadwater County	4.6	3.9	4.4

### Income and Earnings

The total personal income of an area represents the total income of all its residents from all sources: earnings from participation in

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<sup>22</sup>U.S. Department of Commerce, *U.S. Census of Population: 1950*, table 25, p. 26-30; *idem*, *U.S. Census of Population: 1970*, table 46, p. 28-113.

<sup>23</sup>Montana Department of Labor and Industry, Employment Security Division, *Montana Employment and Labor Force*, January 1974 (Helena, Montana), table 1, p. 11; *idem*, unpublished data (Helena, Montana).



the labor force, as wage and salary workers or proprietors; income from property, in the form of rent, dividends, and interest; and transfer payments--pensions, veterans' benefits, welfare, and other payments for which no current services are rendered.

Income and Earnings by Source. Total personal income in the two-county impact area was about \$50.5 million in 1950. During the next two decades, it increased by 185 percent, to about \$143.7 million in 1970 (table 21). Over the same years, total personal income in the state was increasing only 149 percent.<sup>24</sup>

Prior to 1966, the average annual growth rate for total personal income in the impact area was the same as that for all of Montana; between 1966 and 1970, however, the two-county area grew much more rapidly than did the state:<sup>25</sup>

	Average Annual Rate of Growth in Total Personal Income	
	<u>1950-1966</u>	<u>1966-1970</u>
Montana	4.1%	6.8%
Helena impact area	4.1	10.8

The late 1960s were very good years for the Helena area. We think the rate of growth since 1966 may be slightly overstated because of a peculiarity in the process of estimating employment and earnings by county. Wage and salary employment, and wages and salaries, are based largely upon records of the employment security program, which administers

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<sup>24</sup>U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, Regional Economics Information System, unpublished data (Washington, D.C., August 1973).

<sup>25</sup>*Ibid.*





Table 21  
Total Personal Income by Major Sources in the Helena Impact Area  
Selected Years 1950-1971  
(Thousands of Dollars)

	<u>1950</u>	<u>1959</u>	<u>1962</u>	<u>1965</u>	<u>1966</u>	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>
Total personal income	50,468	74,823	85,293	90,254	95,306	108,142	116,362	128,898	143,664	156,647
Total earnings <sup>a</sup>	43,278	60,227	69,538	72,659	76,726	86,333	91,836	100,695	111,674	121,732
Wages and salaries	30,990	46,258	53,857	58,200	61,978	70,350	75,309	83,399	92,381	101,539
Other labor income <sup>b</sup>	671	1,602	1,887	2,144	2,332	3,112	3,336	3,841	4,515	5,274
Proprietors' income	11,617	12,367	13,794	12,315	12,416	12,871	13,191	13,455	14,778	14,919
Farm	5,956	4,351	5,943	3,526	3,259	2,734	3,427	3,963	4,652	4,115
Nonfarm	5,661	8,016	7,851	8,789	9,157	10,137	9,764	9,492	10,126	10,804
Property income <sup>c</sup>	5,181	10,891	11,804	13,027	13,819	16,056	17,536	20,875	22,878	24,173
Transfer payments <sup>d</sup>	2,826	5,556	6,286	7,356	8,177	9,835	11,265	12,291	14,676	16,906
Less: personal contributions for social insurance	817	1,851	2,335	2,788	3,416	4,082	4,275	4,463	5,564	6,164

Source: U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, National Economics Information System, unpublished data (Washington, D.C., August 1973).

Note: The Helena impact area includes Lewis and Clark and Broadwater counties.

<sup>a</sup>Total earnings of labor force participants; also referred to as participation income because it is income that results from direct participation in the labor force.

<sup>b</sup>Fringe benefits.

<sup>c</sup>Rent, dividends, and interest.

<sup>d</sup>Payments for which no services are rendered--e.g., retirement pensions, veterans' payments, and welfare payments.



unemployment insurance. Employers report employment and wages and salaries paid when they remit unemployment insurance premiums to the state, and these reports become the basis for employment and earnings estimates by counties. Until recently, many multi-county employers reported only once for all their operations. Since the late 1960s this procedure has been gradually changing and employers have begun reporting by county. This means that substantial numbers of employees and large amounts of wages which formerly were put into a separate "statewide" category may suddenly be added to estimates of employment and incomes for a particular county. Thus, in table 23, under earnings, we see earnings in the transportation, communication, and public utilities group increase from \$3.1 million in 1966 to \$10.0 million in 1967. The reason: industry data formerly included in the "statewide" category were disaggregated and distributed among the counties in 1967, and Helena contains the state headquarters of the Mountain Bell telephone company. There is no way of adjusting for these problems; however, we suspect that the actual rate of growth in the total personal income between 1966 and 1970 was somewhat less than 10.8--but still significantly higher than for the state as a whole.

Patterns of growth for the impact area among the various sources of income have been similar to those for the state as a whole. The fastest-growing sources of income in the area between 1950 and 1970 were property income and transfer payments:<sup>26</sup>

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<sup>26</sup>*Ibid.* Property income includes rent, dividends, and interest income; transfer payments are those for which no services are rendered (e.g., retirement pensions, veterans' payments, and welfare payments). Personal contributions for social insurance (social security) are a deduction from total income.



	Thousands of Dollars <u>1950</u>	<u>1970</u>	<i>Percent Change</i>
Total personal income	\$50,468	\$143,664	185
Total earnings	43,278	111,674	158
Wages and salaries	30,990	92,381	198
Other labor income	671	4,515	573
Proprietors' income	11,617	14,778	27
Property income	5,181	22,878	342
Transfer payments	2,826	14,676	419
Less: personal contributions for social insurance	817	5,564	581

Total earnings in the area (that is, wages and salaries, other labor income, and proprietors' income) grew at a much slower--although quite respectable--rate and declined in importance from approximately 86 to 78 percent of total income.

Of course, income figures expressed in current dollars exaggerate growth because they do not reflect changes in price levels. Expressed in terms of 1967 purchasing power (or "real" or 1967 dollars), the growth in income between 1950 and 1970 was still impressive but less than what the current dollars would indicate:<sup>27</sup>

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<sup>27</sup>*Ibid.*, derived using the Consumer Price Index (CPI), based on 1967 dollars.



	Thousands of 1967 Dollars		<i>Percent Change</i>
	<u>1950</u>	<u>1970</u>	
Total personal income	\$69,997	\$123,529	76
Total earnings	60,025	96,022	60
Wages and salaries	42,982	79,433	85
Other labor income	931	3,882	317
Proprietors' income	16,112	12,707	-21
Property income	7,186	19,672	174
Transfer payments	3,920	12,619	222
Less: personal contributions for social insurance	1,133	4,784	322

It is evident, in looking at these "real" dollar figures, that price inflation played a big role in the growth of total personal income. When its effects are removed, proprietors' income actually declined overall between 1950 and 1970; the relatively small increase in nonfarm proprietors' income was insufficient to offset the decline in farm proprietors' income. Because the two-county impact area as a whole is not as dependent on agriculture as it is on other industries, this decline did not affect the overall income picture as greatly as it might have in other areas of Montana. Overall, the 76 percent increase in total "real" personal income in the impact area compares favorably with the 54 percent gain for the state as a whole.<sup>28</sup>

Lewis and Clark County, of course, accounts for almost all of the total personal income of the two-county impact area. In 1950, about 89 percent of combined total income went to Lewis and Clark County residents; within nine years the proportion had grown to 93 percent, and by 1970

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<sup>28</sup>U.S. Department of Commerce, unpublished data.





(and 1971) it was up to 95 percent (tables 21 and 22). As was mentioned earlier, during the 1950s and 1960s, Broadwater experienced declines in both population and employed labor force. Although total personal income in current dollars increased by about \$2 million, or 35 percent, from 1950 to 1970, when translated into "real" or 1967 dollars, the county's income actually declined.<sup>29</sup>

While comparable income and earnings data are not available for the city of Helena, Helena would account for the bulk of the county's and the impact area's total income and earnings.

Earnings by Industry. Although earnings did not grow as rapidly as property income and transfer payments, they did account for almost three-fourths of the increase in total personal income in the Helena impact area from 1950 to 1970 (table 21). This is not surprising, since earnings constitute the major source of total personal income.

Changes in earnings by industry closely follow changes in employment. Almost three-quarters of the dollar increase in the impact area accrued to workers in government (federal, state and local), services, and wholesale and retail trade. Thirty percent of the increase occurred in state and local government alone (table 23). (We are ignoring the large increase shown for transportation, communications, and public utilities because we question the figures.)

Farm earnings, which fluctuate a great deal from year to year, were 10 percent lower in 1970 than in 1950; in terms of "real" dollars, 1970 farm earnings were 44 percent below 1950.<sup>30</sup> This is particularly

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<sup>29</sup>*Ibid.*

<sup>30</sup>*Ibid.*, and derived using the Consumer Price Index.



Table 22

Total Personal Income by Major Sources in Lewis and Clark County  
Selected Years 1950-1971

(Thousands of Dollars)

	<u>1950</u>	<u>1959</u>	<u>1962</u>	<u>1965</u>	<u>1966</u>	<u>1967</u>	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>
Total personal income	44,694	69,797	78,835	84,449	89,277	102,016	109,802	121,925	135,882	148,248
Total earnings <sup>a</sup>	38,072	56,093	64,139	68,135	72,036	81,735	86,959	95,549	106,020	115,634
Wages and salaries	29,542	44,576	51,850	55,971	59,565	67,847	72,685	80,659	89,492	98,163
Other labor income <sup>b</sup>	651	1,555	1,829	2,072	2,253	3,030	3,245	3,742	4,395	5,123
Proprietors' income	7,879	9,962	10,460	10,092	10,218	10,858	11,029	11,148	12,133	12,348
Farm	2,703	2,441	3,111	1,845	1,624	1,318	1,791	2,159	2,499	2,065
Nonfarm	5,176	7,521	7,349	8,247	8,594	9,540	9,238	8,989	9,634	10,283
Property income <sup>c</sup>	4,853	10,334	11,146	12,189	12,922	15,048	16,429	19,666	21,537	22,755
Transfer payments <sup>d</sup>	2,543	5,137	5,779	6,794	7,570	9,128	10,496	11,456	13,649	15,749
Less: personal contributions for social insurance	774	1,767	2,229	2,669	3,251	3,895	4,082	4,746	5,324	5,890

Source: U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, Regional Economics Information System, unpublished data (Washington, D.C., August 1973).

<sup>a</sup>Total earnings of labor force participants; also referred to as participation income because it is income that results from direct participation in the labor force.<sup>b</sup>Fringe benefits.<sup>c</sup>Rent, dividends, and interest.<sup>d</sup>Payments for which no services are rendered--e.g., retirement pensions, veterans' payments, and welfare payments.



Table 23

Total Earnings by Broad Industrial Sector in the Helena Impact Area  
Selected Years 1950-1971

(Thousands of Dollars)

	1950	1959	1962	1965	1966	1967	1968	1969	1970	1971
Total earnings	43,278	60,227	69,538	72,659	76,726	86,333	91,836	100,695	111,674	121,732
Farm earnings	7,197	5,731	7,288	4,863	4,908	4,555	5,021	5,743	6,470	6,209
Nonfarm earnings	36,081	54,496	62,250	67,796	71,818	81,778	86,815	94,952	105,204	115,523
Government	8,344	15,282	18,531	23,102	24,392	25,896	29,048	32,481	36,323	40,900
Federal	4,153	5,652	7,087	7,992	8,191	8,913	9,685	10,666	11,783	13,575
State and local	4,191	9,630	11,444	15,110	16,201	16,983	19,363	21,815	24,540	27,325
Private nonfarm	27,737	39,214	43,719	44,694	47,426	55,882	57,767	62,471	68,881	74,623
Manufacturing	4,506	5,065	5,258	6,580	7,092	6,724	6,664	8,308	9,128	9,218
Mining	764	304	161	222	131	157	176	NA	NA	NA
Contract construction	5,373	6,542	10,520	6,377	6,713	5,877	5,235	5,608	7,582	7,818
Transportation, communications, and public utilities										
Wholesale and retail trade	2,668	3,187	3,385	3,169	3,143	10,003	10,510	11,036	11,015	11,789
Finance, insurance, and real estate	6,313	8,479	9,362	10,764	11,095	11,305	11,742	13,109	14,203	15,814
Services	3,214	6,170	4,786	5,113	5,489	6,489	7,013	7,293	NA	NA
Other	4,982	3,371	10,152	12,345	13,639	15,146	16,261	16,717	18,552	21,017
	17	96	95	119	124	131	166	NA	NA	NA

Source: U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, Regional Economics Information System, unpublished data (Washington, D.C., August 1973).

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. Total earnings denotes the total earnings of labor force participants; it is also referred to as participation income because it is income that results from direct participation in the labor force. Total earnings or participation income includes wages and salaries, other labor income (fringe benefits), and proprietors' income. NA denotes that the figure for the impact area is not available because the data are not available for one or both of the two counties making up the impact area; the data are, however, included in the totals.



significant for Broadwater County, where in 1970 approximately half the earnings came from agriculture, as opposed to only 3 percent in Lewis and Clark (table 24).<sup>31</sup>

In 1970, government, trade, and services accounted for 62 percent of total earnings in the two-county area. Government alone accounted for 33 percent (table 23).

All but 3 percent of total nonagricultural earnings in the two-county area are generated in Lewis and Clark County, mostly in Helena (table 24). Although we do not have income and earnings for the city, 1970 population and employment data (in tables 12-15) confirm the overwhelming importance of Helena within the impact area.

The following REIS figures for 1970 summarize the contributions to total wage and salary employment and total earnings by the major industries in the two-county impact area:<sup>32</sup>

	Percentage of Total Employment	Earnings
Farm	3%	6%
Nonfarm	97	94
Government	36	33
Federal	8	11
State and local	28	22
Manufacturing	7	8
Mining	NA	NA
Construction	5	7
Transportation, communications, and public utilities	8	10
Trade	16	13
Finance, insurance and real estate	NA	NA
Services	20	17
Other	NA	NA
Total	100%	100%

<sup>31</sup>U.S. Department of Commerce, unpublished data.

<sup>32</sup>*Ibid.* The REIS wage and salary employment data are presented rather than census data because the industry classifications are the same as those for the REIS earnings data, whereas the census classifications are not. NA denotes that the data are not available for one or both of the impact area counties because of nondisclosure.





Table 24

**Total Earnings by Broad Industrial Sector in Lewis and Clark County  
Selected Years 1950-1971**

(Thousands of Dollars)

	<u>1950</u>	<u>1959</u>	<u>1962</u>	<u>1965</u>	<u>1966</u>	<u>1967</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>
Total earnings	38,072	56,093	64,139	68,135	72,036	81,735	86,959	106,020	115,634
Farm earnings	3,344	3,374	4,020	2,681	2,664	2,467	2,796	3,651	3,391
Nonfarm earnings	34,728	52,719	60,119	65,454	69,372	79,268	84,163	102,369	112,243
Government	8,064	14,824	17,926	22,460	23,689	25,208	28,272	31,684	39,960
Federal	4,057	5,497	6,899	7,808	7,956	8,700	9,424	10,413	13,308
State and local	4,007	9,327	11,027	14,652	15,733	16,508	18,848	21,271	26,652
Private nonfarm	26,664	37,895	42,193	42,994	45,683	54,060	55,891	60,577	72,283
Manufacturing	4,474	4,893	5,024	6,272	6,776	6,418	6,327	7,935	8,665
Mining	734	245	117	162	83	100	152	0	0
Contract construction	5,308	6,490	10,432	6,308	6,636	5,777	5,157	5,545	7,738
Transportation, communications, and public utilities									
Wholesale and retail trade	2,509	3,070	3,256	3,057	3,019	9,864	10,361	10,876	11,631
Finance, insurance, and real estate	5,827	7,920	8,668	10,018	10,352	10,559	10,949	12,340	14,909
Services	3,166	6,123	4,739	5,059	5,424	6,423	6,937	7,177	8,598
Other	4,633	9,084	9,886	12,029	13,300	14,821	15,873	16,316	20,509
	13	70	71	89	93	98	135	0	0

Source: U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, Regional Economics Information System, unpublished data (Washington, D.C., August 1973).

Notes: Total earnings denotes the total earnings of labor force participants; it is also referred to as participation income because it is income that results from direct participation in the labor force. Total earnings or participation income includes wages and salaries, other labor income (fringe benefits), and proprietors' income. D denotes that the data were withheld to avoid disclosure for individual firms; the data are, however, included in the totals.



Table 25 provides a comparison of the average earnings of wage and salary workers in various industries covered by unemployment insurance for 1960, 1965, and 1970-1972. It excludes figures for the largest industry, government, because the data are not available. The two highest-paying industries among those listed in table 25 are stone, clay, glass, and concrete products (the Permanete cement plant) and the communications industry (Mountain Bell). We have already noted that Mountain Bell maintains its state headquarters in Helena. The large increase in earnings in the communications industry between 1965 and 1970 reflects the addition of figures for Mountain Bell employees; in earlier years, they had been reported on a statewide basis and were not included in Lewis and Clark County data.

Average annual earnings for all covered workers in Lewis and Clark County have been slightly below the state average (from 1 to 5 percent) in recent years, while the average in Broadwater has been far below, from 20 to 30 percent.<sup>33</sup>

Because of its limited industrial base (manufacturing, mining) and the concentration of its employment in low-paying trade and service jobs, Lewis and Clark County earnings in covered employment do not compare favorably with other larger Montana counties (such as Yellowstone, Cascade, Missoula, Flathead, Silver Bow, and Deer Lodge).

Per Capita Personal Income. One measure of the relative economic status of an area's residents is per capita personal income: total personal income of all residents divided by total population.

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<sup>33</sup>Montana Department of Labor and Industry, Employment Security Division, unpublished data (Helena, Montana).



Average Annual Wages Paid in Covered Industries, by Industry  
Helena Impact Area  
Selected Years 1960-1972

	1960 <sup>a</sup>	1965	1970	1971	1972
Agriculture services and crop production <sup>b</sup>	NA	\$3,405	3,776	\$3,771	\$4,724
Mining	\$3,804	5,271	7,353	5,354	5,792
Construction	5,343	6,423	7,682	8,410	8,546
Manufacturing	5,059	5,901	7,832	8,255	9,139
Food and kindred products	NA	4,688	6,543	4,806	5,930
Lumber and wood products	NA	4,455	4,965	5,694	6,760
Printing, publishing, and allied industries	NA	6,254	8,015	8,491	9,797
Stone, clay, glass and concrete products	NA	7,504	9,968	10,432	11,258
Primary metals	NA	6,517	8,687	8,459	9,566
All other manufacturing	NA	5,291	8,223	8,536	9,131
Transportation (except railroads), communications, and public utilities	3,434	4,171	8,204	8,887	9,769
Communications	NA	4,272	8,113	9,512	10,494
All other	NA	3,895	4,232	4,380	4,791
Wholesale trade	3,440	4,661	7,314	7,790	7,884
Retail trade		3,580	4,154	4,467	4,699
General merchandise stores	NA	3,733	4,113	4,481	4,696
Food stores	NA	3,043	4,190	4,401	4,899
Auto dealers and service stations	NA	4,295	5,131	5,584	6,002
Eating and drinking places	NA	2,557	3,333	3,046	3,142
All other retail trade	NA	4,143	4,157	5,107	5,420
Finance, insurance, and real estate	4,168	4,901	6,234	6,551	6,623
Banking	NA	5,284	6,949	7,257	7,483
All other	NA	4,586	5,252	6,092	6,122
Services and other	3,541 <sup>c</sup>	4,122	5,163	5,133	5,175
Hotels and other lodging places	NA	2,028	3,253	3,346	3,290
Personal services	NA	3,558	3,523	3,876	4,299
Business services	NA	4,639	4,503	4,760	4,564
Health services	NA	2,945	3,797	3,903	4,938
Educational services	NA	2,021	2,139	2,036	7,626
All other	NA	5,216	6,530	6,778	6,206
All covered industries, total	4,157	4,769	6,146	6,371	6,477

Sources: Derived from Department of Labor and Industry, Employment Security Division, unpublished data (Helena, Montana), using employment and total wages data.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties.

These data are for covered industries only—that is, those covered by the state unemployment insurance program. Industry groups not included are agriculture (except for agricultural services and some agriculture production); railroads; federal government; state government (except state hospitals and institutions of higher education included as of January 1, 1972); local government; nonprofit institutions (except hospitals, private higher education institutions, and nonprofit membership organizations included as of January 1, 1972); domestics and private household workers; and nonagricultural self-employed and unpaid family workers.

The wages data are wages paid to employees only and do not include proprietors' income and other labor income.

<sup>a</sup>Derived separately from fiscal year data.

<sup>b</sup>Includes crop services and horticultural services and general crop (including horticultural specialties) farms.

<sup>c</sup>Other includes agriculture services and nonclassified.



In 1950, per capita income for the two-county impact area was over \$1,800, more than \$300 above the average for the state as a whole. Nine years later it had grown to over \$2,400, and by 1962 it was up to \$2,600, which was still significantly higher than the state's average (table 26). By 1965, though, the state's average (about \$2,800) surpassed the impact area's per capita income (about \$2,700), indicating that total personal income had not kept pace with the growing population, especially in Lewis and Clark County, where per capita income grew by only \$8 overall between 1962 and 1965. It was not until 1970 that per capita income in the impact area (almost \$4,000) again surpassed the state's average (\$3,900); the 1971 figures indicate a continuation of the trend (table 26).

Overall, per capita personal income in the impact area has more than doubled in the twenty-year period, an average growth rate of 4 percent annually. For the state as a whole, the average annual growth rate was 5 percent (table 26). Both areas have experienced a more rapid growth in recent years, with the impact area moving ahead of the state. Between 1965 and 1971, per capita income in the two-county area increased at an average annual rate of 8 percent, while the state figure grew by 7 percent (table 26). Unfortunately, much of the growth in per capita income was a result of price inflation; when per capita income is measured in 1967 dollars, the growth is considerably smaller:<sup>34</sup>

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<sup>34</sup>U.S. Department of Commerce, unpublished data, derived using the Consumer Price Index.





Table 26

Per Capita Personal Income in Montana, the Helena  
Impact Area, and Lewis and Clark County  
Selected Years 1950-1971

	<u>Montana</u>	<u>Helena Impact Area<sup>a</sup></u>	<u>Lewis and Clark County</u>
1950	\$1,496	\$1,829	\$1,806
1959	2,161	2,428	2,492
1962	2,370	2,639	2,680
1965	2,770	2,657	2,688
1966	2,986	2,732	2,752
1967	3,170	3,071	3,120
1968	3,436	3,284	3,337
1969	3,708	3,621	3,687
1970	3,943	3,978	4,036
1971	4,164	4,228	4,299

Sources: U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, *Survey of Current Business*, vol. 53, no. 8 (August 1973), table 2, p. 43; and *idem*, Regional Economics Information System, unpublished data (Washington, D.C., August 1973).

<sup>a</sup>The Helena impact area includes Lewis and Clark and Broadwater counties.



	<u>Montana</u>	<u>Helena Impact Area</u>
1950	\$2,075	\$2,537
1959	2,475	2,781
1962	2,616	2,913
1965	2,931	2,812
1970	3,390	3,420
1971	3,433	3,486

It is interesting to note that Broadwater County's 1950 per capita income of almost \$2,000 was higher than that of Lewis and Clark County, the impact area, or the state. By 1959, with the sharp decline in agricultural incomes, Broadwater's per capita income had fallen behind and by 1971 had not regained its favorable position.<sup>35</sup> When the estimates for 1972 and 1973, years of very high farm income, become available, they will almost surely show a significant increase for the county.

No comparable income figures are available for Helena alone.

Although the REIS data indicate that per capita income in the impact area has not always compared favorably with the state figures, family income estimates from the 1970 census place Lewis and Clark County first among Montana counties in median family income in 1969. The \$10,000-plus reported for the county in 1969 may be compared to \$8,500 for all families in the state, a low \$7,038 for Broadwater County families, and almost \$10,500 for Helena families.<sup>36</sup> Median family income, of course, refers to midpoint; half the families reporting had higher incomes and half had lower.

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<sup>35</sup>U.S. Department of Commerce, unpublished data.

<sup>36</sup>U.S. Department of Commerce, *U.S. Census of Population: 1970*, tables 41 and 44, pp. 28-109 and 28-111.



It should be noted that the income definitions used by the Bureau of Economic Analysis in developing its personal income estimates and by the Census Bureau in estimating family incomes are not the same. Also, the per capita estimates are arithmetic means and the family income figures are medians. Although they do not always agree, both sets of data indicate that Lewis and Clark in recent years has been among the highest income counties of the state. This is not surprising in view of the high proportion of county residents in the labor force.

In 1970 the ratio of nonworkers to workers in Lewis and Clark County was a very low 1.21: for every worker there were only 1.21 nonworkers residing in the county. Only two of the other fifty-five counties had lower ratios, and the state as a whole was considerably higher at 1.56.<sup>37</sup> The county's low dependency ratio is easily explained: among the fifty-six counties, Lewis and Clark has by far the greatest proportion of its female population in the labor force--over 50 percent, compared to less than 40 percent for the state as a whole.<sup>38</sup>

### Transportation Facilities

Helena, as the focal point of the two-county impact area, has relatively good access to most major cities in Montana.

Air and Rail. Air service for Helena and the surrounding area is provided by Northwest Airlines (east-west service) and Western Airlines (north-south service). In fiscal 1970, there were about 2,100 commercial aircraft departures from the Helena municipal airport, with about 22,500 passengers boarding; since fiscal 1965, departures from the Helena air-

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<sup>37</sup>*Ibid.*, table 44, p. 28-111.

<sup>38</sup>*Ibid.*



port have accounted for about 6 to 7 percent of all departures in the state, and passengers boarding at Helena have constituted about 4 to 5 percent of the state total (table 27). At present, the two airlines serving the Helena area are providing six flights daily.<sup>39</sup>

Rail passenger service is not as convenient. AMTRAK rail passenger service is available at Butte, sixty-four miles southwest of Helena, with bus service available between Helena and Butte. Rail freight service, on the other hand, is considerably better, with an average of sixteen freight trains provided daily through Helena.<sup>40</sup>

Bus. The previously mentioned bus service between Helena and Butte, furnished by the Clark Fork Valley Express Company, provides six buses weekly. Clark Fork Valley also operates two buses daily to and from Missoula. Other bus lines include the Intermountain Transportation Company, with service between Helena and Missoula and other cities; Rim Rock Stages, with two routes daily to and from Billings; and a charter bus service (Canyon Lines Transportation, Inc.). Several motor freight carriers are also available.<sup>41</sup>

Highways. Helena is centrally located among several of Montana's major cities and has relatively convenient highway access to these and other areas in the state. As indicated in figure 1, access north and south of Helena is provided primarily by U.S. Highway 91 and Interstate 15; east and west access is provided primarily by U.S. Highways 12 and

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<sup>39</sup>Lewis and Clark County Overall Economic Development Program (OEDP) Council, *Lewis and Clark County Overall Economic Development Program* (Helena, Montana, June 1972), p. 27.

<sup>40</sup>*Ibid.*

<sup>41</sup>Helena Chamber of Commerce, "Facts About Helena, Montana" (Helena, Montana, 1974); and The Montana Power Company, "Community Profile, Helena" (n.p., n.d.).





Table 27

Air Carrier Departures and Passengers  
Montana and Helena  
Fiscal Years 1962-1970

	Aircraft Departures <sup>a</sup>		Passengers <sup>b</sup>	
	Montana	Helena	Montana	Helena
1962	21,502	1,241	155,835	5,033
1963	22,171	1,421	173,740	7,016
1964	22,510	1,429	208,081	7,788
1965	21,679	1,403	233,425	9,542
1966	24,108	1,433	273,417	11,731
1967	26,092	1,479	316,930	13,800
1968	34,276	2,173	408,663	18,596
1969	36,077	2,800	468,578	22,775
1970	34,244	2,143	467,533	22,535

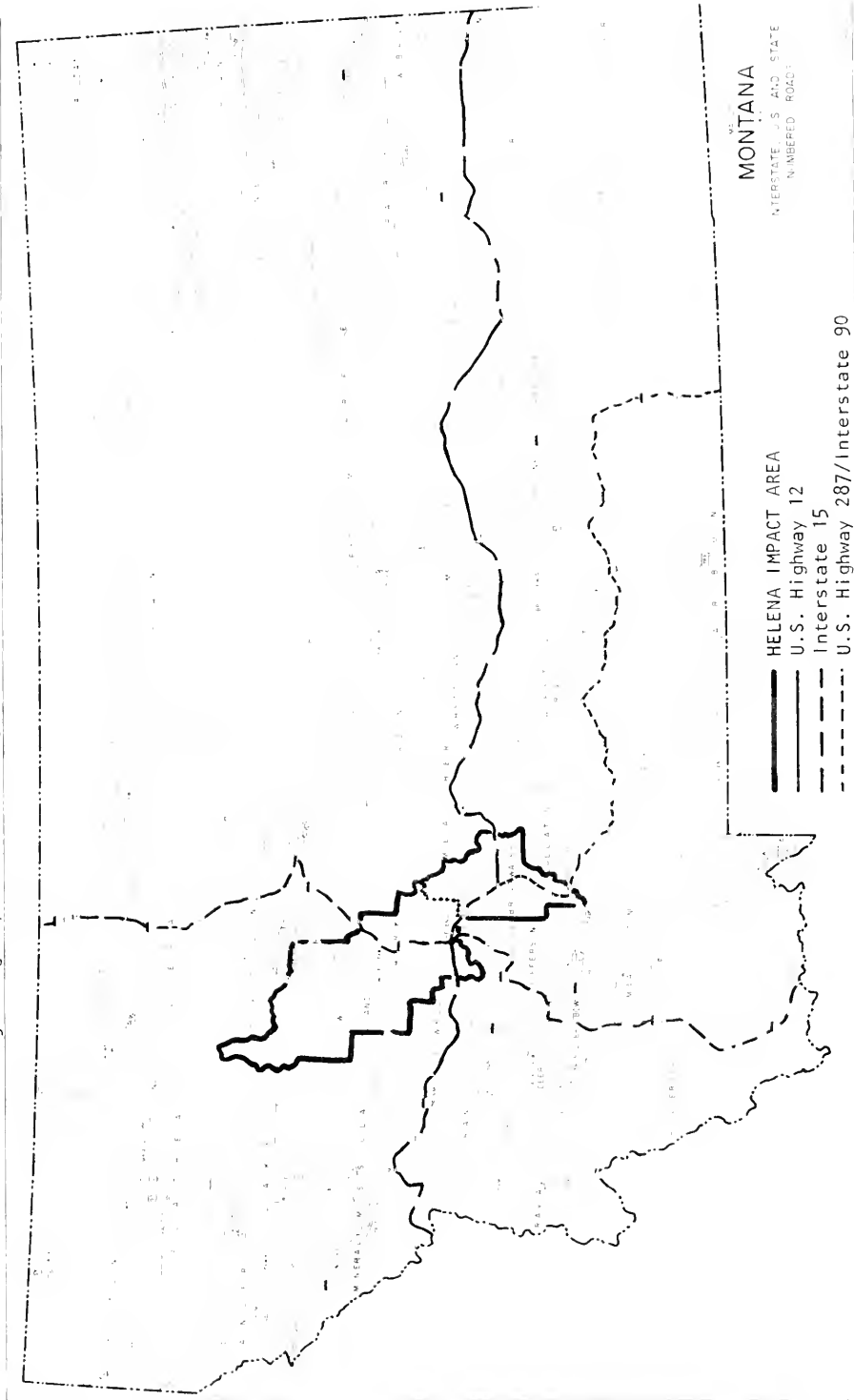
Sources: Civil Aeronautics Board and U.S. Department of Transportation, Federal Aviation Administration, *Airport Activity Statistics of Certificated Route Air Carriers*, fiscal years 1962-1970 (Washington, D.C.: U.S. Government Printing Office), part II, table 3.

<sup>a</sup>Total number of aircraft departures performed in all services (scheduled and nonscheduled) by certificated air carriers.

<sup>b</sup>Total number of revenue passengers boarding certificated aircraft in all services (scheduled and nonscheduled)--includes originating, stop-over, and transfer passengers.



Major Highway Network Serving Helena and the Helena Impact Area





287. Interstate 15 is the major north-south route in the state and U.S. 287 connects with Interstate 90, the major east-west route in the state. Helena serves as a point of intersection in this major road network.

Interstate 15-U.S. 91 is a four-lane facility to Great Falls, ninety miles northeast of Helena, and the Canadian border. The southern route of Interstate 15-U.S. 91 runs through Boulder and Butte, and on to the Idaho border. The twelve-mile section south of Helena is a four-lane facility with an additional 12.3 miles under construction.<sup>42</sup> U.S. 12 westward from Helena connects at Garrison with Interstate 90-U.S. 10, continuing to Missoula (116 miles west of Helena) and beyond, to the Idaho border. U.S. 12 east of Helena, runs in a southeasterly direction joining U.S. 287 to Townsend in Broadwater County, and then turns eastward to the eastern border of the state, while U.S. 287 connects further south with Interstate 90, which provides access eastward to Bozeman and Billings and beyond (figure 1).

The Department of Highways has recognized U.S. 12, leading east and west of Helena, to be most in need of reconstruction within the Helena economic growth center and the two-county impact area. The Federal Aid Primary (FAP) road section (of U.S. 12) extending twelve miles west from Helena's west city limits was constructed in 1933; no major reconstruction has been accomplished since then, and, as a result, that section is worn out and no longer adequate for current traffic. The same is true for that portion of U.S. 12 which leads east from Helena for six miles

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<sup>42</sup>Montana Department of Highways, "Helena, Montana, An Economic Growth Center," p. 13.



and which was constructed in 1936.<sup>43</sup> In spite of the already obsolete condition of these two sections of U.S. 12, the daily traffic along these routes has continued to increase through 1972, in some cases doubling the flow of roughly twenty years earlier (table 28). In addition, these two sections out of Helena (twelve miles west and six miles east) are by far the most heavily traveled sections of U.S. 12 inside the two-county impact area. This is especially true for the two sections immediately west and east of Helena.

The increasing traffic along these obsolete and deteriorating sections of U.S. 12 east and west of Helena adds to other traffic congestion along the route and serves to further impede the smooth flow of traffic to and from the area. Some reconstruction of U.S. 12 is now underway, by the Federal Highway Administration, covering a four-mile section from the top of McDonald Pass to Elliston in Powell County (an area west of the impact area).<sup>44</sup> The Montana Department of Highways has recognized the need for updating other sections of U.S. 12 (within Lewis and Clark County) to accommodate modern-day traffic and intends to reconstruct that section, converting it from a two-lane to a four-lane facility.<sup>45</sup>

While the daily traffic volume along U.S. 12 has been increasing, the reliance of impact area residents on automobiles has also been growing, especially since 1970. The number of automobiles registered in the entire impact area has increased considerably: during the sixties, the annual

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<sup>43</sup>*Ibid.*

<sup>44</sup>Montana Department of Highways, Construction Bureau (Helena, Montana), telephone conversation.

<sup>45</sup>Montana Department of Highways, "Helena, Montana, An Economic Growth Center," p. 13.





Table 28

Average Daily Traffic at Selected Points along U.S. Highway 12  
in the Helena Impact Area  
1951, 1960, 1965, and 1970-1972

Section Description	Section Length (miles) <sup>a</sup>	Average Daily Traffic--All Vehicles				
		1951	1960	1965	1970	1972
1: Lewis and Clark County line (west)	13	934	1,335	1,388	1,521	1,611
2: JCT of FAS 356, urban area (Lewis and Clark County)	1	2,890	4,375	5,221	4,830	4,981
3: JCT of Interstate 15, urban area (Lewis and Clark County)	3	2,699	NA	4,268	5,261	5,787
4: JCT of FAS 518, East Helena city limits (Lewis and Clark County)	5	1,088	NA	1,850	2,058	2,210
5: Broadwater County line (north)	9	826	1,220	1,339	1,584	1,546
6: JCT of FAS 554 (Broadwater County)	12	NA	NA	NA	1,613	1,691
7: Townsend city limits (north)	1	NA	1,544	1,892	2,452	NA

Source: Montana Department of Highways, *Traffic by Sections*, 1960, 1965, 1972 (Helena, Montana).

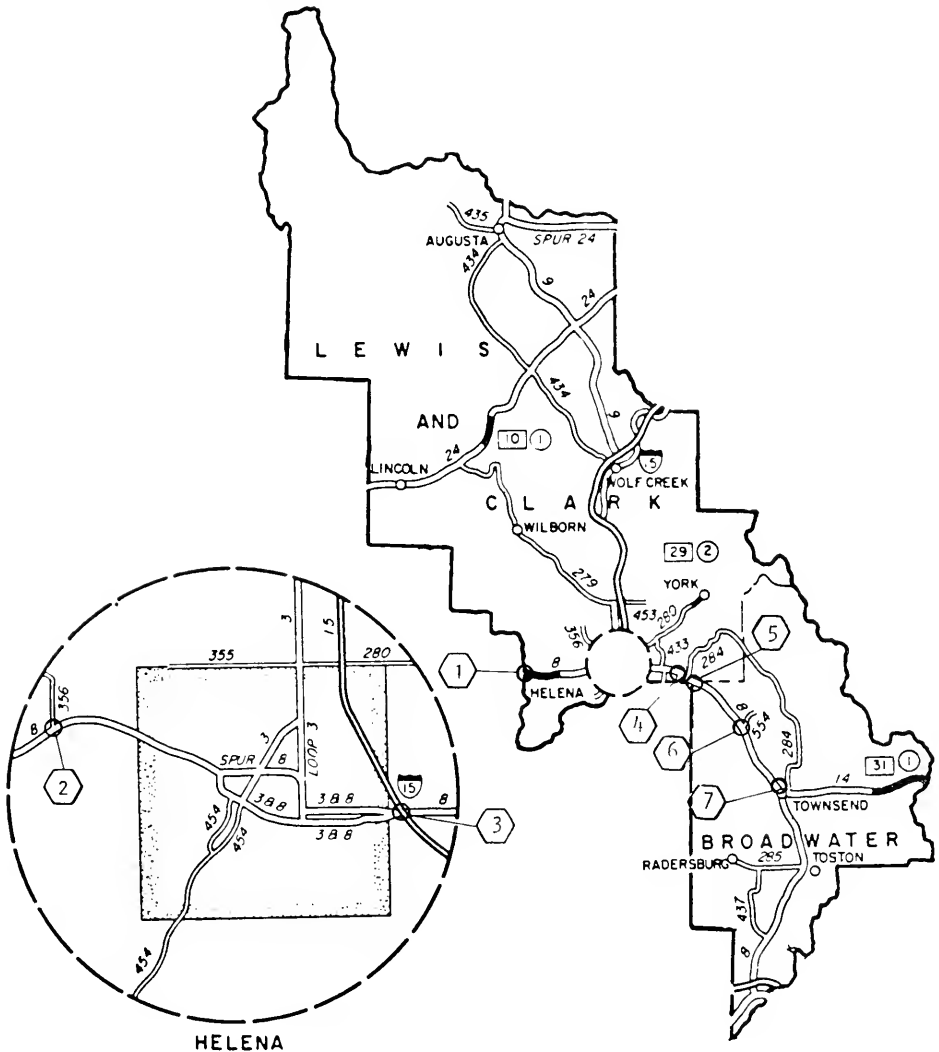
Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. FAS denotes Federal Aid Secondary highway. NA denotes not available. See figure 2 (map) for the location of the sections.

<sup>a</sup>Length as of 1972, rounded to the nearest mile.



Figure 2

Traffic Count Sections along U.S. Highway 12 in the Helena Impact Area



Source: Montana Department of Highways, Planning and Research Bureau (Helena, Montana, January 1974). From a Montana highway map showing Federal Aid Interstate, Primary, and Secondary routes and forest highway routes.

Note: The numbered sections--①--correspond to the section descriptions in table 28.



increase averaged about 485 additional autos registered per year; from 1970 to 1973, however, the average jumped to about 1,000 per year (table 29). Lewis and Clark County, of course, was largely responsible for the increase, as can be seen from table 30. However, auto registrations in Broadwater County also grew remarkably between 1970 and 1973 after declining, overall, during the sixties.<sup>46</sup>

The ratio of residents to autos (based on the data in tables 1 and 29) has also changed considerably in the impact area, as it has in other major counties and in the state as a whole:<sup>47</sup>

	Persons Per Registered Auto		
	<u>1960</u>	<u>1970</u>	<u>1973</u>
Helena impact area	2.42	2.04	1.85
Lewis and Clark County	2.46	2.04	1.85
Montana	2.59	2.17	1.98
Cascade County	2.58	2.12	1.96
Gallatin County	2.52	2.29	2.08
Missoula County	2.49	2.10	1.85
Silver Bow County	2.80	2.24	2.00
Yellowstone County	2.38	2.00	1.82

This, along with the increased daily traffic flow along U.S. 12, indicates the increasing reliance of the impact area residents on their automobiles and their highways, especially since convenient public transportation is

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<sup>46</sup>Registrar of Motor Vehicles, "Total Vehicle Registration" (Deer Lodge, Montana).

<sup>47</sup>*Ibid.*; U.S. Department of Commerce, *U.S. Census of Population: 1970*, table 9, p. 28-12; *idem*, Bureau of the Census, "Estimates of the Population of Montana Counties, July 1, 1971 and July 1, 1972," *Current Population Reports*, Series P-26, no. 19 (Washington, D.C., 1973), p. 2; and *idem*, "Estimates of the Population of Montana Counties and Metropolitan Areas: July 1, 1972 and 1973," table 1, pp. 2-4. Derived.



Table 29

Vehicle Registrations in the Helena Impact Area  
Selected Years 1960-1973

	<u>1960</u>	<u>1965</u>	<u>1970</u>	<u>1971</u>	<u>1973</u>
Passenger cars	12,728	15,380	17,581	18,667	20,610
Trucks	4,011	5,259	6,928	7,290	8,833
Trailers	1,704	2,053	2,992	3,253	3,986
Motorcycles	--	709	1,490	1,612	1,958
Total	18,443	23,401	28,991	30,822	35,387

Source: Registrar of Motor Vehicles, "Total Vehicle Registration" (Deer Lodge, Montana).

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. These data are annual totals as of December 31 of each year; they exclude state and county exempts, snowmobiles, house trailers, and special mobile equipment. The figures include RPOs (vehicles registered for registration purposes only)--e.g., a construction worker working in the state only temporarily would register his auto so as to get current Montana plates but would retain title in his home state.





Table 30  
Vehicle Registrations in Lewis and Clark County  
Selected Years 1960-1973

	<u>1960</u>	<u>1965</u>	<u>1970</u>	<u>1971</u>	<u>1973</u>
Passenger cars	11,375	14,044	16,350	17,375	19,209
Trucks	3,146	4,262	5,813	6,153	7,512
Trailers	1,494	1,859	2,781	3,021	3,661
Motorcycles	--	644	1,407	1,524	1,804
Total	16,015	20,809	26,351	28,073	32,186

Source: Registrar of Motor Vehicles, "Total Vehicle Registration" (Deer Lodge, Montana).

Notes: These data are annual totals as of December 31 of each year; they exclude state and county exempts, snowmobiles, house trailers, and special mobile equipment. The figures include RPOs (vehicles registered for registration purposes only)--e.g., a construction worker working in the state only temporarily would register his auto so as to get current Montana plates but would retain title in his home state.



not readily available within the impact area, and adds further support to the need to update the obsolete sections of U.S. 12 to accommodate modern-day traffic.

#### Commercial and Industrial Activities

Lewis and Clark County, and specifically the city of Helena, is a governmental center, and the government sector has been the great stabilizer and growth factor in the Helena impact area. The private sector of the economy, however, also is deserving of some discussion. The following focuses on those activities for which reliable and useful data are available.

Agriculture. Agricultural operations continue to contribute to the economy of the impact area but are not expected to provide much additional employment. Much agricultural land is being converted from agricultural production to such other uses as residential development and highways. Lewis and Clark County, and thus the impact area, has experienced this trend, as indicated by the data on farm acreage: in 1969, approximately 1.5 million acres of land in the impact area were devoted to farming and ranching, some 600,000 acres, or 30 percent, less than the figures ten years earlier (table 31). The total number of commercial farms and ranches in the impact area also declined, and the average acreage per farm has dropped by about 15 percent, to some 3,600 acres. In contrast, however, the value of land and buildings in all farms and ranches has almost doubled over the ten-year period, partially because of price inflation (table 31).

Although agriculture accounts for only a very small proportion of total employment and income in Lewis and Clark County, two-thirds of the



Table 31

Characteristics of Farms and Ranches in the Helena Impact Area  
1959, 1964, and 1969

	All Farms and Ranches			Commercial Farms and Ranches <sup>a</sup>		
	1959	1964	1969	1959	1964	1969
All farms and ranches (number)	540	543	564	517	417	421
Land in farms and ranches (acres)	2,208,604	1,958,315	1,548,985	2,197,705	1,859,209	1,523,979
Average size of farms/ranches (acres)	4,090	3,606	2,746	4,251	4,459	3,620
Value of land and buildings (000)	\$45,513 <sup>b</sup>	\$ 73,064 <sup>b</sup>	\$ 86,703	\$45,968 <sup>b</sup>	\$ 63,796 <sup>b</sup>	\$ 82,064
Average per farm/ranch	\$84,283 <sup>b</sup>	\$134,556 <sup>b</sup>	\$153,729	\$88,913 <sup>b</sup>	\$152,988 <sup>b</sup>	\$194,927
Average per acre	\$ 21 <sup>b</sup>	\$ 37 <sup>b</sup>	\$ 56	\$ 21 <sup>b</sup>	\$ 34 <sup>b</sup>	\$ 79

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Agriculture: 1964, Statistics for States and Counties, Montana*, vol. 1, pt. 38 (Washington, D.C.: U.S. Government Printing Office, 1967), tables 1 and 5, pp. 226, 228, 246, and 248; and *idem*, *Census of Agriculture: 1969, Area Reports, Montana*, vol. 1, pt. 38, sec. 2 (Washington, D.C.: U.S. Government Printing Office, 1972), tables 1 and 9, pp. 33, 35, 201, and 203. Some of the 1964 data were obtained from the 1969 census and some were from the 1964 census.

Note: The Helena impact area includes Lewis and Clark and Broadwater counties.

<sup>a</sup>Farms with a total value of farm products sold amounting to \$2,500 or more.

<sup>b</sup>Derived.



land in farms in the two-county area is in Lewis and Clark County, and individual units there are larger and more valuable than in Broadwater County (table 32). At the same time, there are many small, residential farms in Lewis and Clark County--evidently reflecting the desire of some Montanans to live in the country even though employed in town (tables 33 and 34).

Farm sales in the impact area rose moderately overall in the ten-year period, only partially due to price inflation. Livestock, poultry, and their products account for the bulk of the agricultural products sold, over 75 percent in 1969 (table 35). Chief among these is beef cattle; in fact, beef cattle operations are probably the most important agricultural enterprise--primarily range cow-calf operations but also other operations, such as feed lots and stocker operations. The data in tables 35 and 36 suggest that in ten years there's not been much change in the composition of agricultural production in either the impact area or Lewis and Clark County. The significant increases recorded recently in agricultural prices have, of course, caused agricultural income to soar, and this will have a salutary effect on area businesses serving the farm population. Even though farm incomes continue high, however, there is little reason to expect any increase in agricultural employment.

Mineral Production. Although Helena got its start as a mining camp, the mining industry's contribution to the area economy has been modest in recent years. Likewise, the area's contribution to total state production has been very small, as is evident from the data in table 37. And while production has fluctuated during the sixties, it apparently peaked around the mid-1960s at almost \$4 million and has declined since then. In addition, the limited county data for 1970 and 1971 suggest further declines.





Table 32

Characteristics of Farms and Ranches in Lewis and Clark County  
1959, 1964, and 1969

	All Farms and Ranches		Commercial Farms and Ranches <sup>a</sup>	
	<u>1959</u>	<u>1964</u>	<u>1959</u>	<u>1964</u>
All farms and ranches (number)	319	335	277	236
Land in farms and ranches (acres)	1,744,627	1,465,350	1,709,006	1,382,034
Average size of farms/ranches (acres)	5,469	4,374		
Value of land and buildings (000)	\$29,174 <sup>b</sup>	\$ 49,093 <sup>b</sup>	6,170	5,856
Average per farm/ranch	\$91,453	\$146,545	\$ 27,725 <sup>b</sup>	\$ 40,473 <sup>b</sup>
Average per acre	\$ 25	\$ 34	\$100,092	\$171,496
			\$ 25	\$ 33
			\$ 25	\$ 50

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Agriculture: 1964, Statistics for States and Counties, Montana*, vol. 1, pt. 38 (Washington, D.C.: U.S. Government Printing Office, 1967), tables 1 and 5, pp. 228 and 248; and *idem, Census of Agriculture: 1969, Area Reports, Montana*, vol. 1, pt. 38, sec. 2 (Washington, D.C.: U.S. Government Printing Office, 1972), tables 1 and 9, pp. 201 and 203. Some of the 1964 data were obtained from the 1969 census and some were from the 1964 census.

<sup>a</sup>Farms with a total value of farm products sold amounting to \$2,500 or more.

<sup>b</sup>Derived.



Table 33

Size of Farms and Ranches in the Helena Impact Area  
and Lewis and Clark County  
1959, 1964, and 1969

	Helena Impact Area <sup>a</sup>		Lewis and Clark County	
	1959	1964	1959	1964
All farms and ranches	540	543	319	335
Less than 180 acres	112	120	73	94
180 to 499 acres	98	111	51	62
500 to 999 acres	75	67	37	31
1,000 to 1,999 acres	76	74	48	44
2,000 acres and over	179	171	110	104
Commercial farms and ranches <sup>b</sup>	517	417	277	236
Less than 180 acres	NA	49	NA	38
180 to 499 acres	NA	79	NA	36
500 to 999 acres	NA	56	NA	22
1,000 to 1,999 acres	NA	69	NA	41
2,000 acres and over	NA	164	NA	99

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Agriculture: 1959, Montana*, vol. 1, pt. 38 (Washington, D.C.: U.S. Government Printing Office, 1961), table 4, pp. 136 and 138; *idem*, *Census of Agriculture: 1964, Statistics for States and Counties, Montana*, vol. 1, pt. 38 (Washington, D.C.: U.S. Government Printing Office, 1967), table 3, pp. 236 and 238; and *idem*, *Census of Agriculture: 1969, Area Reports, Montana*, vol. 1, pt. 38, sec. 2 (Washington, D.C.: U.S. Government Printing Office, 1972), tables 2 and 10, pp. 33, 36, 201, and 204.

NA denotes that the data are not available.

<sup>a</sup>The Helena impact area includes Lewis and Clark and Broadwater counties.

<sup>b</sup>Farms with a total value of farm products sold amounting to \$2,500 or more.



Table 34

Farms and Ranches, by Economic Class, in the Helena Impact Area  
and Lewis and Clark County  
1959, 1964, and 1969

	Helena Impact Area <sup>a</sup>			Lewis and Clark County		
	1959 <sup>b</sup>	1964	1969	1959 <sup>b</sup>	1964	1969
All farms and ranches	571	543	564	324	335	357
Class 1--Sales of \$40,000 and over	44	44	86	33	31	50
Class 2--Sales of \$20,000 to \$39,999	130	76	97	59	31	48
Class 3--Sales of \$10,000 to \$19,999	159	119	89	69	67	51
Class 4--Sales of \$5,000 to \$9,999	117	101	74	65	57	51
Class 5--Sales of \$2,500 to \$4,999	54	77	75	40	50	55
Class 6 <sup>c</sup>	13	26	16	11	19	12
All other farms and ranches <sup>d</sup>	54	100	127	47	80	90

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Agriculture: 1959, Counties, Montana*, vol. 1, pt. 38 (Washington, D.C.: U.S. Government Printing Office, 1961), table 5, pp. 141 and 143; and *idem, Census of Agriculture: 1969, Area Reports, Montana*, vol. 1, pt. 38, sec. 2 (Washington, D.C.: U.S. Government Printing Office, 1972), table 4, pp. 33 and 201.

<sup>a</sup>The Helena impact area includes Lewis and Clark and Broadwater counties.

<sup>b</sup>The 1959 figures do not agree with similar figures elsewhere in the report because they are based on sample data rather than on complete count data from all farms and ranches.

<sup>c</sup>Farms and ranches with total sales of \$50 to \$2,499 and a farm operator under sixty-five years of age who did not work off the farm 100 days or more in the census year.

<sup>d</sup>Includes (1) other farms and ranches with sales of \$50 to \$2,499, and (part-time) a farm operator under sixty-five years of age who worked off the farm 100 days or more in the census year or (part-retirement farm) an operator sixty-five years of age or older; and (2) abnormal farms, such as institutional farms, experimental and research farms, and Indian reservations.



Table 35

Value of Farm Products Sold in the Helena Impact Area  
1959, 1964, and 1969

	<u>1959</u>	<u>1964</u>	<u>1969</u>
Market value of all agricultural products sold	\$10,527,393	\$9,407,400	\$14,383,739
Average per farm <sup>a</sup>	19,495	17,325	25,503
All crops	2,346,625	2,450,762	3,405,056
Field crops including nursery products and hay	NA	2,435,790	3,223,497
Forest products	NA	14,972	181,559
Livestock, poultry, and their products	8,180,768	6,955,462	10,978,683
Poultry and poultry products	136,378	172,318	NA
Dairy products	639,875	462,126	NA
All other livestock and livestock products	7,404,515	6,321,018	NA

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Agriculture: 1964, Statistics for States and Counties, Montana*, vol. 1, pt. 38 (Washington, D.C.: U.S. Government Printing Office, 1967), table 6, pp. 252 and 254; and *idem*, *Census of Agriculture: 1969, Area Reports, Montana*, vol. 1, pt. 38, sec. 2 (Washington, D.C.: U.S. Government Printing Office, 1972), table 4, pp. 33 and 201.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. Detail for the 1964 data does not add to the total but is correct as reported in the 1969 census. NA denotes that the detail for the impact area is not available because the data are not available for one or both of the two counties making up the impact area.

<sup>a</sup>Derived using total number of farms and ranches and total market value of all agricultural products sold.





Table 36

Value of Farm Products Sold in Lewis and Clark County  
1959, 1964, and 1969

	<u>1959</u>	<u>1964</u>	<u>1969</u>
Market value of all agricultural products sold			
Average per farm	\$6,476,306 19,989	\$5,890,850 17,585	\$8,448,734 23,665
All crops	1,108,883	1,014,649	1,437,406
Field crops including nursery products and hay	NA		
Forest products	NA	999,677 14,972	1,277,244 160,162
Livestock, poultry, and their products	5,367,423	4,875,511	7,011,328
Poultry and poultry products	116,773	137,558	NA
Dairy products	368,070	442,802	NA
All other livestock and livestock products	4,882,580	4,295,151	NA

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Agriculture: 1964, Statistics for States and Counties, Montana*, vol. 1, pt. 38 (Washington, D.C.: U.S. Government Printing Office, 1967), table 6, p. 254; and *idem*, *Census of Agriculture: 1969, Area Reports, Montana*, vol. 1, pt. 38, sec. 2 (Washington, D.C.: U.S. Government Printing Office, 1972), table 4, p. 201.

Notes: Detail for the 1964 data does not add to the total but is correct as reported in the 1969 census. NA denotes that the data are not available.



Table 37

Value of Total Mineral Production in Montana,  
the Helena Impact Area, and Lewis and Clark County  
1960-1971

(Thousands of Dollars)

	<u>Montana</u>	<u>Helena Impact Area<sup>a</sup></u>	<u>Lewis and Clark County</u>
1960	178,854	1,973	1,709
1961	184,233	1,808	1,651
1962	190,656	2,303	2,128
1963	182,018	3,601	3,344
1964	211,452	3,645	3,538
1965	228,159	3,977	3,437
1966	245,268	2,332	2,093
1967	186,524	1,088	818
1968	228,131	1,145	875
1969	282,631	2,483	2,114
1970	313,016	NA	D
1971	285,073	NA	548

Sources: U.S. Department of the Interior, Bureau of Mines, *The Mineral Industry of Montana*, 1961, 1963-1965, 1967, 1969, and 1971, Reprints from the *Minerals Yearbook* (Washington, D.C.: U.S. Government Printing Office).

D denotes that the data were withheld to avoid disclosure for individual firms.

NA denotes that the figure for the impact area is not available because the data are not available for one or both of the two counties making up the impact area.

<sup>a</sup>The Helena impact area includes Lewis and Clark and Broadwater counties.



Mineral production in the impact area has consisted mostly of silver, lead, and zinc--together they accounted for about 75 percent of total mineral production in 1968 (tables 37 and 38). Unfortunately, the recent closure of The Anaconda Company's zinc smelting operations has directly affected mineral production in the impact area. Unless potential large-scale mines in the Lincoln area should be developed, the industry is not likely to provide significant income or employment in the years ahead.

Retail Trade. As in other parts of Montana, retail trade has been one of the growing segments of the impact area's economy. We have already noted its importance as an employer and a source of income. Sample data from the Census of Business indicate that the number of establishments in the impact area increased by about 12 percent (41 establishments) in the nine years between 1958 and 1967. At the same time, total dollar retail sales in the impact area grew by about 49 percent (table 40); the increase in physical volume appears to have been about 29 percent, after adjusting for price increases.

Similar growth was also seen in Lewis and Clark County and in Helena, as indicated by the data in tables 41 and 42. What should be noted, however, is that while there were an estimated 55 more establishments in Helena in 1967 than in 1958, the number of retail stores outside Helena declined. This suggests that the familiar pattern of a decline in rural trade areas and an increase in the larger towns is being repeated here.

Average sales per retail establishment have also grown considerably since 1958:<sup>48</sup>

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<sup>48</sup>U.S. Department of Commerce, Bureau of the Census, *Census of Business: 1958, Retail Trade, Montana*, BC58-RA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, p. 26-8; *idem*, *Census of Business: 1967, Retail Trade, Montana*, BC67-RA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, p. 28-8. Derived.



Table 38

## Production of Selected Minerals in the Helena Impact Area, 1960-1970

	Gold		Silver		Copper		Lead		Zinc		Total Value (\$000)
	Troy Ounces	Value (\$000)	Troy Ounces	Value (\$000)	Short Tons	Value (\$000)	Short Tons	Value (\$000)	Short Tons	Value (\$000)	
1960	2,816	98	19,391	18	18	12	596	140	5,493	1,417	1,684
1961	885	31	21,591	20	19	11	627	130	5,969	1,373	1,564
1962	265	9	14,176	16	NA	NA	NA	NA	7,055	1,623	1,853
1963	193	7	6,621	8	NA	NA	NA	NA	NA	NA	2,301
1964	188	6	8,762	12	NA	NA	1,256	329	8,488	2,308	NA
1965	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	2,618
1966	57	2	21,939	28	7	5	573	173	4,786	1,388	1,597
1967	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA	NA
1968	NA	NA	34,518	74	NA	NA	730	193	2,186	590	875
1969	NA	NA	104,343	187	NA	NA	744	222	NA	NA	1,839
1970	37	1	12,558	23	1	1	59	18	43	13	56

Sources: U.S. Department of the Interior, Bureau of Mines, *The Mineral Industry of Montana, 1960-1970*, Reprints from 1960-1970 *Minerals Yearbooks: Area Reports*, vol. 2 (Washington, D.C.: U.S. Government Printing Office).

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. Detail may not add to totals due to rounding. NA denotes that the figure for the impact area is not available because the data are not available for one or both of the two counties making up the impact area; the data are, however, included in the totals. There are no data for 1971 for the impact area because 1971 data are available only for Lewis and Clark County at this time.





Table 39

## Production of Selected Minerals in Lewis and Clark County, 1960-1970

	Gold		Silver		Copper		Lead		Zinc		Total Value (\$000)
	Troy Ounces	Value (\$000)	Troy Ounces	Value (\$000)	Short Tons	Value (\$000)	Short Tons	Value (\$000)	Short Tons	Value (\$000)	
1960	152	5	11,103	10	17	11	555	130	5,480	1,414	1,570
1961	285	10	19,650	18	19	11	610	126	5,961	1,371	1,536
1962	183	6	12,661	14	0	0	0	0	7,052	1,622	1,837
1963	164	6	6,491	8	4	2	1,375	297	8,634	1,986	2,299
1964	184	6	8,331	11	1	1	1,252	328	8,480	2,306	2,652
1965	209	7	42,176	55	5	3	1,200	374	7,394	2,159	2,599
1966	56	2	21,615	28	7	5	571	172	4,783	1,387	1,595
1967	38	1	7,742	12	1	1	214	60	1,508	418	492
1968	336	13	21,029	45	4	3	451	119	2,166	585	765
1969	88	4	97,315	174	2	2	724	216	4,859	1,419	1,815
1970	36	1	4,820	9	1	1	36	11	2	1	23
1971	50	2	8,120	13	4	4	39	11	1	-- <sup>a</sup>	30

Sources: U.S. Department of the Interior, Bureau of Mines, *The Mineral Industry of Montana, 1960-1970*, Reprints from 1960-1970 *Minerals Yearbooks: Area Reports*, vol. 2 (Washington, D.C.: U.S. Government Printing Office); *idem*, *The Mineral Industry of Montana*, Preprint from 1971 *Minerals Yearbook* (Washington, D.C.: U.S. Government Printing Office, 1973), table 6, p. 6.

Notes: Detail may not add to totals due to rounding. 0 denotes that the data were withheld to avoid disclosure for individual firms; the data are, however, included in the total.

<sup>a</sup> Less than \$500.



Table 40  
Retail Trade in the Helena Impact Area  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments			
Number	343	373	384
Total sales (000)	\$40,431	\$48,084	\$60,319
Active proprietors of unincorporated businesses	360	353	365
Establishments with payroll			
Number	277	295	299
Total sales (000)	\$38,987	\$46,380	\$58,590
Payroll, entire year (000)	\$ 4,364	\$ 5,696	\$ 7,230
Paid employees <sup>a</sup>	1,682	1,761	1,926

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Business: 1958, Retail Trade, Montana*, BC58-RA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, p. 26-8; *idem*, *Census of Business: 1963, Retail Trade, Montana*, BC63-RA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 3, p. 28-8; and *idem*, *Census of Business: 1967, Retail Trade, Montana*, BC67-RA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, p. 28-8.

Note: The Helena impact area includes Lewis and Clark and Broadwater counties.

<sup>a</sup>Paid employees for the workweek ending nearest November 15 for 1958 and 1963 data and for the pay period including March 12 for 1967 data.



Table 41  
Retail Trade in Lewis and Clark County  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments			
Number	312	329	350
Total sales (000)	\$37,871	\$44,614	\$56,370
Active proprietors of unincorporated businesses	336	316	333
Establishments with payroll			
Number	252	267	269
Total sales (000)	\$36,531	\$43,404	\$54,758
Payroll, entire year (000)	\$ 4,139	\$ 5,390	\$ 6,874
Paid employees <sup>a</sup>	1,612	1,681	1,822

Sources: U.S. Department of Commerce, Bureau of the Census, *Survey of Business: 1958, Retail Trade, Montana*, BC58-RA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, p. 26-8; *idem*, *Census of Business: 1963, Retail Trade, Montana*, BC63-RA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 3, p. 28-8; and *idem*, *Census of Business: 1967, Retail Trade, Montana*, BC67-RA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, p. 28-8.

<sup>a</sup>Paid employees for the workweek ending nearest November 15 for 1958 and 1963 data and for the pay period including March 12 for the 1967 data.



Table 42  
Retail Trade in the City of Helena  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments			
Number	237	263	292
Total sales (000)	\$34,592	\$41,322	\$52,672
Active proprietors of unincorporated businesses	251	249	266
Establishments with payroll			
Number	203	217	225
Total sales (000)	\$33,828	\$40,408	\$51,357
Payroll, entire year (000)	\$ 3,856	\$ 4,969	\$ 6,425
Paid employees <sup>a</sup>	1,452	1,528	1,667

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Business: 1958, Retail Trade, Montana*, BC58-RA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, p. 26-8; *idem*, *Census of Business: 1963, Retail Trade, Montana*, BC63-RA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 3, p. 28-8; and *idem*, *Census of Business: 1967, Retail Trade, Montana*, BC67-RA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, p. 28-8.

<sup>a</sup>Paid employees for the workweek ending nearest November 15 for 1958 and 1963 data and for the pay period including March 12 for 1967 data.





	<u>1958</u>	<u>1967</u>
Montana	\$104,416	\$152,488
Helena impact area	117,875	157,081
Lewis and Clark County	121,381	161,057
City of Helena	145,958	180,384

Average sales of retailers in the impact area, in Lewis and Clark County, and in Helena grew by 24 to 33 percent over the nine-year period, not as fast as for the state as a whole. However, all three continue to exceed the state's average, especially Helena.

Although spending habits and patterns differ from area to area, per capita retail sales figures make it possible to compare spending on a per-person basis. In 1963, estimated per capita sales amounted to approximately \$1,500; by 1967 the average had risen to about \$1,700. Unfortunately, composite sales data for some of the various kinds of businesses are not available for the impact area. Looking at 1967 per capita sales figures for Lewis and Clark County points up the more urban nature of the county vis-a-vis the state (e.g., building materials and farm equipment sales are lower) but reveals few other striking differences. Service station sales per capita are lower, while sales for eating and drinking places are higher, leaving little to say about the probable influence of travel and tourism.<sup>49</sup>

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<sup>49</sup>U.S. Department of Commerce, *Census of Business: 1967, Retail Trade*, tables 3 and 8, pp. 26-8, 28-9, and 28-10; *idem*, unpublished data; and 1968 population estimates from the Bureau of Business and Economic Research, University of Montana (Missoula, Montana, 1969). Derived. The 1968 population estimates were used for the 1967 average because they are considerably more accurate than the 1967 estimates.



Table 43

Retail Establishments and Sales by Kind of Business  
Helena Impact Area, 1958, 1963, and 1967

	Establishments			Sales (\$000)	
	1958	1963	1967	1963	1967
All establishments	343	373	384	48,084	60,319
Lumber, building materials, hardware, farm equipment	21	32	22	6,004	4,614
General merchandise stores	9	13	14	NA	NA
Food stores	48	44	45	9,286	14,949
Automotive dealers	22	21	30	10,964	NA
Gasoline service stations	55	50	47	3,629	4,307
Apparel and accessories	25	26	23	NA	2,627
Furniture, home furnishings, and equipment stores	20	26	25	NA	NA
Eating and drinking places	86	97	89	5,399	5,630
Drug and proprietary stores	14	11	14	NA	NA
Other retail stores	42	44	57	3,057	4,091
Nonstore retailer	1	9	18	515	953

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Business: 1958, Retail Trade*, BC58-RA-26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 100, pp. 26-8 and 26-9; *idem*, *Census of Business: 1963, Retail Trade*, BC63-RA-28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 3, pp. 28-8 and 28-9; and *idem*, *Census of Business: 1967, Retail Trade*, BC67-RA-28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, pp. 28-8 and 28-9.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. NA denotes that the figure for the impact area is not available because the data are not available for one or both of the two counties making up the impact area; the data are, however, included in the "all establishments" total.



Table 44

Retail Establishments and Sales by Kind of Business  
Lewis and Clark County, 1958, 1963, and 1967

	Establishments			Sales (\$000)	
	1958	1963	1967	1963	1967
All establishments	312	329	350	44,614	56,370
Lumber, building materials, hardware, farm equipment	17	24	16	4,746	3,732
General merchandise stores	8	11	12	3,577	5,730
Food stores	40	37	39	8,479	13,910
Automotive dealers	21	18	28	10,439	11,580
Gasoline service stations	51	46	44	3,420	3,751
Apparel and accessories	25	25	23	2,516	2,627
Furniture, home furnishings, and equipment stores	18	25	24	1,946	2,690
Eating and drinking places	80	86	80	5,196	5,387
Drug and proprietary stores	13	9	13	910	2,453
Other retail stores	38	39	53	2,870	3,557
Nonstore retailers	1	9	18	515	953

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Business: 1958, Retail Trade, Montana*, BC58-RA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, pp. 26-8 and 26-9; *idem*, *Census of Business: 1963, Retail Trade, Montana*, BC63-RA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 3, pp. 28-8 and 28-9; and *idem*, *Census of Business: 1967, Retail Trade, Montana*, BC67-RA28, table 3, pp. 28-8 and 28-9.

D denotes that the data were withheld to avoid disclosure for individual firms; the data are, however, included in the "all establishments" total.



Table 45

Retail Establishments and Sales by Kind of Business  
City of Helena, 1958, 1963, and 1967

	Establishments			Sales (\$000)	
	1958	1963	1967	1963	1967
All establishments	237	263	292	41,322	52,672
Lumber, building materials, hardware, farm equipment	11	16	13	4,478	3,333
General merchandise stores	8	7	8	3,392	5,601
Food stores	31	32	31	8,045	12,941
Automotive dealers	20	18	26	10,439	D
Gasoline service stations	34	33	36	2,578	3,208
Apparel and accessories	23	25	23	2,647	2,627
Furniture, home furnishings, and equipment stores	16	22	24	1,805	2,690
Eating and drinking places	55	61	56	4,114	4,142
Drug and proprietary stores	13	8	12	1,413	D
Other retail stores	25	34	46	2,069	3,310
Nonstore retailers	1	7	17	D	D

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Business: 1958, Retail Trade, Montana*, BC58-R-2 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, pp. 26-8 and 26-9; *idem*, *Census of Business: 1963, Retail Trade, Montana*, BC63-R-2 (Washington, D.C.: U.S. Government Printing Office, 1964), table 3, pp. 28-8 and 28-9; and *idem*, *Census of Business: 1967, Retail Trade, Montana*, BC67-R-28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, pp. 28-8 and 28-9.

D denotes that the data were withheld to avoid disclosure for individual firms; the data are, however, included in the "all establishments" total.





	Per Capita Retail Sales	
	Montana	Lewis and Clark County
Total per capita sales	\$1,640	\$1,745
Lumber, building materials, hardware and farm equip- ment dealers	185	116
General merchandise stores	151	177
Food stores	357	431
Auto dealers	333	359
Gasoline service stations	147	116
Eating and drinking places	138	167
All other	329	380

It is unfortunate that these figures are for 1967 and that results of the *1972 Census of Business* are not available at the time this is written.

Wholesale Trade. Very limited data are available on wholesale trade operations in the impact area and its component counties. Composite data for the impact area from the *Census of Business* indicate that while there's been little change in the number of wholesale establishments between 1958 and 1967--a net loss of one establishment--there have been sizeable increases in total dollar sales (75 percent). Nearly all the wholesaling activity takes place in Lewis and Clark County, mostly in Helena (tables 46-48).

Wholesale trade in the impact area is modest in terms of its total picture as a whole (only 3 percent of total sales in the state in 1967) and especially in relation to such wholesale centers as Yellowstone and Cascade counties. A look at average sales per wholesale establishment in 1967 substantiates the impact area's smaller scale:<sup>50</sup>

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<sup>50</sup>U.S. Department of Commerce, Bureau of the Census, *Statistical Abstract for 1967, Wholesale Trade, Montana*, BC67-WA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 4, pp. 28-8 and 28-9. Derived.



Table 46

Wholesale Trade in the Helena Impact Area  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments	58	60	57
Merchant wholesalers	35	38	37
Other operating types	23	22	20
Total sales, all establishments (000)	\$21,411	\$26,628	\$37,488
Merchant wholesalers	NA	NA	\$20,779
Other operating types	NA	NA	\$16,709
Payroll, entire year (000)	\$ 1,245	\$ 2,059	\$ 2,689
Paid employees <sup>a</sup>	277	390	381
Active proprietors of unincorporated businesses	20	29	23

Sources: U.S. Department of Commerce, Bureau of the Census,  *Census of Business: 1958, Wholesale Trade, Montana*, BC58-WA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, pp. 26-6 and 26-7; *idem*, *Census of Business: 1963, Wholesale Trade, Montana*, BC63-WA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 4, p. 28-8; and *idem*, *Census of Business: 1967, Wholesale Trade, Montana*, BC67-WA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 4, p. 28-8.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties.

Merchant wholesalers are establishments primarily engaged in buying and selling merchandise on their own account, including farm products merchants who do not buy primarily from farmers. Included are wholesale merchants or jobbers, industrial distributors, voluntary group wholesalers, wagon distributors, retailer cooperative warehouses, terminal grain elevators, and wholesale cooperative supply associations. Other operating types are manufacturers' sales branches and sales offices; petroleum bulk stations, terminals, LP gas facilities; merchandise agents and brokers; and farm products assemblers.

NA denotes that the figure for the impact area is not available because the data are not available for one or both of the two counties making up the impact area.

<sup>a</sup>Paid employees for the workweek ending nearest November 15 for 1958 and 1963 data and for the pay period including March 12 for the 1967 data.



Table 47

Wholesale Trade in Lewis and Clark County  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments	51	53	53
Merchant wholesalers	34	37	37
Other operating types	17	16	16
Total sales, all establishments (000)	\$20,517	\$25,337	\$36,358
Merchant wholesalers	\$12,504	\$15,590	\$20,779
Other operating types	\$ 8,013	\$ 9,747	\$15,579
Payroll, entire year (000)	\$ 1,208	\$ 1,985	\$ 2,638
Paid employees <sup>a</sup>	263	367	374
Active proprietors of unincorporated businesses	20	27	23

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Commerce: 1958, Wholesale Trade, Montana*, BC58-WA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, p. 26-7; *idem*, *Census of Business: 1963, Wholesale Trade, Montana*, BC63-WA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 4, p. 28-8; and *idem*, *Census of Business: 1967, Wholesale Trade, Montana*, BC67-WA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 4, p. 28-8.

Note: Merchant wholesalers are establishments primarily engaged in buying and selling merchandise on their own account, including farm products merchants who do not buy primarily from farmers. Included are wholesale merchants or jobbers, industrial distributors, voluntary group wholesalers, wagon distributors, retailer cooperative warehouses, terminal grain elevators, and wholesale cooperative supply associations. Other operating types are manufacturers' sales branches and sales offices; petroleum bulk stations, terminals, LP gas facilities; merchandise agents and brokers; and farm products assemblers.

<sup>a</sup>Paid employees for the workweek ending nearest November 15 for 1958 and 1963, and for the pay period including March 12 for the 1967 data.



Table 48

Wholesale Trade in the City of Helena  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments	48	45	45
Merchant wholesalers	34	35	34
Other operating types	14	10	11
Total sales, all establishments (000)	D	\$23,162	\$33,824
Merchant wholesalers	\$12,504	D	D
Other operating types	D	D	D
Payroll, entire year (000)	D	\$ 1,884	\$ 2,505
Paid employees <sup>a</sup>	D	344	350
Active proprietors of unincorporated businesses	D	23	20

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Montana: 1963, Wholesale Trade, Montana*, BC58-WA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, p. 26-7; *idem*, *Census of Business: 1963, Wholesale Trade, Montana*, BC63-WA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 4, p. 28-8; and *idem*, *Census of Business: 1967, Wholesale Trade, Montana*, BC67-WA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 4, p. 28-8.

Notes: Merchant wholesalers are establishments primarily engaged in buying and selling merchandise on their own account, including farm products merchants who do not buy primarily from farmers. Included are wholesale merchants or jobbers, industrial distributors, voluntary group wholesalers, wagon distributors, retailer cooperative warehouses, terminal grain elevators, and wholesale cooperative supply associations. Other operating types are manufacturers' sales branches and sales offices; petroleum bulk stations, terminals, LP gas facilities; merchandise agents and brokers; and farm products assemblers.

D denotes that the data were withheld to avoid disclosure for individual firms.

<sup>a</sup>Paid employees for the workweek ending nearest November 15 for 1958 and 1963 data and for the pay period including March 12 for the 1967 data.





	Average Sales Per Establishment
Helena impact area	\$ 657,684
Lewis and Clark County	686,000
Montana	716,696
Cascade County	1,379,131
Yellowstone County	1,033,616

Selected Services. The *Census of Business* provides information on a limited group of services which it chooses to call selected services. The group includes business, repair, personal, and recreation services, but excludes professional services. Thus employment figures in tables 49 and 50 are considerably smaller than those given in tables 12 and 16. Nevertheless, those services included in the census report have seen considerable increase between 1958 and 1967. The *Census of Business* reported an additional 35 establishments in the impact area by 1967, with total receipts rising by more than 70 percent during that time (table 49). Over 30 percent of the service establishments reported in 1967 were located within Lewis and Clark County, and over 75 percent were in Helena (tables 50 and 51).

Service establishments tend to be small operations--smaller, for example, than the average retail establishment, especially in terms of average sales or receipts per establishment. Compared with all selected service establishments in the state as a whole, however, service establishments in the impact area reported higher average receipts in 1967:<sup>51</sup>

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<sup>51</sup>U.S. Department of Commerce, Bureau of the Census, *Census of Business, 1967, Selected Services, Montana*, BC67-SA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, p. 28-8.



Table 49

Selected Services in the Helena Impact Area  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments	187	231	222
Hotels, motels, tourist courts, and camps	NA	58	48
Personal services	75	79	72
Miscellaneous business services	NA	25	34
Automobile repair, automobile services, garages	23	22	29
Miscellaneous repair services	NA	23	20
Motion pictures	NA	3	3
Other amusement and recreation services	NA	21	16
All other	89	--	--
Total receipts (000)	\$3,859	\$4,931	\$6,660
Payroll, entire year (000)	\$ 892	NA	\$2,101
Paid employees <sup>a</sup>	338	NA	609
Active proprietors of unincorporated businesses	193	114	100

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Business: 1958, Selected Services, Montana*, BC58-SA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, p. 26-8; *Idem*, *Census of Business: 1963, Selected Services, Montana*, BC63-SA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 3, p. 28-6, and *Idem*, *Census of Business: 1967, Selected Services, Montana*, BC67-SA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, p. 28-8.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. NA denotes that the figure for the impact area is not available because the data are not available for one or both of the two counties making up the impact area; in the case of the detail by kind of business, the detail is included in the "all other" category and the "all establishments" total.

<sup>a</sup>Part-time employees for full workweek ending nearest November 1, 1958 and 1963 data and for the pay period including March 12 for the 1967 data.



Table 50

Selected Services in Lewis and Clark County,  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments	173	217	267
Hotels, motels, tourist courts, and camps	NA	55	42
Personal services	67	73	68
Miscellaneous business services	NA	25	32
Automobile repair, automobile services, garages	23	22	29
Miscellaneous repair services	NA	21	18
Motion pictures	NA	2	2
Other amusement and recreation services	NA	19	16
All other	83	--	--
Total receipts (000)	\$3,584	\$4,600	\$6,542
Payroll, entire year (000)	\$ 825	\$1,122	\$2,024
Paid employees <sup>a</sup>	299	356	581
Active proprietors of unincorporated businesses	179	223	172

Sources: U.S. Department of Commerce, Bureau of the Census, *Montana Census of Commerce: 1958, Selected Services, Montana*, BC58-SA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, p. 26-27; *Montana Census of Business: 1963, Selected Services, Montana*, BC63-SA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 3, p. 28-8; and *Montana Census of Business: 1967, Selected Services, Montana*, BC67-SA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, p. 28-8.

NA denotes that the detail by kind of business is not available; the detail is, however, included in the "all other" category and the "all establishments" total.

<sup>a</sup>Paid employees for the workweek ending nearest November 15 for 1958 and 1963 data and for the pay period including March 12 for the 1967 data.



Table 51

Selected Services in the City of Helena  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments	141	164	169
Hotels, motels, tourist courts, and camps	NA	25	24
Personal services	63	63	63
Miscellaneous business services	NA	25	25
Automobile repair, automobile services, garages	19	20	28
Miscellaneous repair services	NA	17	16
Motion pictures	NA	1	1
Other amusement and recreation services	NA	13	12
All other	59	--	--
Total receipts (000)	\$3,278	\$4,123	\$5,819
Payroll, entire year (000)	\$ 778	\$1,058	\$1,913
Paid employees <sup>a</sup>	274	335	411
Active proprietors of unincorporated businesses	147	169	141

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Commerce: 1958, Selected Services, Montana*, BC58-SA26 (Washington, D.C.: U.S. Government Printing Office, 1960), table 102, p. 26-8; *Idem, Census of Business: 1963, Selected Services, Montana*, BC63-SA28 (Washington, D.C.: U.S. Government Printing Office, 1964), table 3, p. 28-8; and *Idem, Census of Business: 1967, Selected Services, Montana*, BC67-SA28 (Washington, D.C.: U.S. Government Printing Office, 1969), table 3, p. 28-P.

NA denotes that the detail by kind of business is not available; the detail is, however, included in the "all other" category and the "all establishments" total.

<sup>a</sup> Paid employees for the workweek ending nearest November 1 for 1958 and 1963 data and for the pay period including March 12 for the 1967 data.





	Average Receipts Per Establishment
Montana	\$26,480
Helena impact area	30,000
Lewis and Clark County	30,879
City of Helena	34,432

As was the case with retail trade firms in the impact area, those service establishments averaging the largest receipts in 1967 were located in Helena.

Hotels and motels are important service activities, especially in Helena. The Model City and Urban Renewal programs currently underway in downtown Helena are expected by many to completely rejuvenate the downtown area by providing considerable new commercial, government, and hotel/motel space as well as large amounts of rehabilitated, expanded, and improved space. One of the first effects of Urban Renewal has been the completion of the first hotel/motel space, comprising 72 rooms; plans have been announced for additional hotel/motel development.<sup>52</sup> Press reports and rumors indicate that some Helena hostelrys are in financial difficulty at the present time. This plus the current gasoline shortage and its anticipated effects on automobile travel could negate, at least in the very near future, any further expansion in the lodging industry. And any serious effects on tourism in general will be felt by other travel-oriented businesses in the area.

Manufacturing. Manufacturing operations in the Helena impact area produce such things as lead bullion from smelter operations in East Helena, portland cement, talc, concrete products, chemicals manufactured

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<sup>52</sup>Montana Department of Highways, "Helena, Montana, An Economic Growth Center," p. 12.



from the byproducts of the East Helena smelters, and lumber and wood products. In addition, there are food product operations (e.g., bakery products and dairy products) and beverage bottling, all of which produce almost entirely for local consumption, as well as printing and publishing operations.<sup>53</sup> Compared with some other areas of the state, however, the two-county impact area has a relatively limited manufacturing base.

The *Census of Manufactures* reported 47 manufacturing establishments in the Helena impact area in 1967, most of which were in lumber and wood products, food and kindred products, and printing and publishing (table 52). Unfortunately, because of nondisclosure of Broadwater County data, some composite data for the impact area are not available for 1967.

Value added by manufacture is generally considered one of the best measures available for comparing the relative economic importance of manufacturing among industries and among geographic areas. Unfortunately, a composite figure is not available for the impact area for 1967; however, Lewis and Clark County contributed about 4 percent of the total value added in the state that year.<sup>54</sup> In 1963, on the other hand, it had accounted for almost 5 percent of the total.<sup>55</sup>

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<sup>53</sup>U.S. Department of Commerce, Bureau of the Census, *Census of Manufactures: 1967, Montana*, MC67(3)-27 (Washington, D.C.: U.S. Government Printing Office, 1970), p. 9; and Helena Chamber of Commerce, "Fact Sheet on Helena, Montana."

<sup>54</sup>U.S. Department of Commerce, Bureau of the Census, *Census of Manufactures: 1967, Montana*, MC67(3)-27 (Washington, D.C.: U.S. Government Printing Office, 1970), table 4, p. 27-4.

<sup>55</sup>U.S. Department of Commerce, Bureau of the Census, *Census of Manufactures: 1963, Montana*, MC63(3)-27 (Washington, D.C.: U.S. Government Printing Office, 1966), table 4, p. 27-6. Value added per production worker is derived.



Table 52

Manufacturing Activity in the Helena Impact Area  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments	47	52	47
With 20 employees or more	10	12	13
By major industry group			
Food and kindred products	10	9	8
Lumber and wood products	20	20	14
Printing and publishing	5	9	7
Stone, clay, and glass products	3	3	5
Machinery, except electrical	3	3	3
All other	6	8	10
All employees	762	826	NA
Production workers	591	638	NA
Total payroll (000)	\$3,571	\$ 4,371	NA
Total wages (000)	\$2,606	\$ 3,225	NA
Value added by manufacture (000)	\$4,680	\$11,581	NA

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Manufactures: 1958, Area Report, Montana*, MC58(3)-25 (Washington, D.C.: U.S. Government Printing Office, 1960), tables 3 and 7, pp. 25-5 and 25-8; *idem*, *Census of Manufactures: 1963, Area Statistics, Montana*, MC63(3)-27 (Washington, D.C.: U.S. Government Printing Office, 1966), tables 4 and 8, pp. 27-6, 27-9, and 27-10; and *idem*, *Census of Manufactures: 1967, Area Series, Montana*, MC67(3)-27 (Washington, D.C.: U.S. Government Printing Office, 1970), tables 4 and 9, pp. 27-4, 27-7, and 27-8.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. NA denotes that the figure for the impact area is not available because the data are not available for one or both of the two counties making up the impact area.



Table 53  
Manufacturing Activity in Lewis and Clark County  
1958, 1963, and 1967

	<u>1958</u>	<u>1963</u>	<u>1967</u>
All establishments	37	45	41
With 20 employees or more	10	12	11
By major industry group			
Food and kindred products	9	8	8
Lumber and wood products	11	15	10
Printing and publishing	5	8	6
Stone, clay, and glass products	3	3	4
Machinery, except electrical	3	1	1
All other	6	8	10
All employees	723	780	700
Production workers	558	605	500
Total payroll (000)	\$3,445	\$ 4,224	\$ 4,400
Total wages (000)	\$2,503	\$ 3,125	\$ 2,900
Value added by manufacture (000)	\$4,436	\$11,300	\$13,600

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Manufactures: 1958, Area Report, Montana*, MC58(3)-25 (Washington, D.C.: U.S. Government Printing Office, 1960), tables 3 and 7, pp. 25-5 and 25-8; *Idem*, *Census of Manufactures: 1963, Area Statistics, Montana*, MC63(3)-27 (Washington, D.C.: U.S. Government Printing Office, 1966), tables 4 and 5, pp. 27-6 and 27-10; and *Idem*, *Census of Manufactures: 1967, Area Report, Montana*, MC67(3)-27 (Washington, D.C.: U.S. Government Printing Office, 1970), tables 4 and 9, pp. 27-4 and 27-8.





Table 54  
Manufacturing Activity in the City of Helena  
1958 and 1963

	<u>1958</u>	<u>1963</u>
All establishments	18	27
With 20 employees or more	4	7
All employees	238	382
Production workers	179	271
Total payroll (000)	\$1,014	\$1,896
Total wages (000)	\$ 762	\$1,287
Value added by manufacture (000)	\$1,830	\$3,077

Sources: U.S. Department of Commerce, Bureau of the Census, *Census of Manufactures: 1958, Area Report, Montana*, MC58(3)-25 (Washington, D.C.: U.S. Government Printing Office, 1960), table 3, p. 25-5; and *Idem*, *Census of Manufactures: 1963, Area Statistics, Montana*, MC63(3)-27 (Washington, D.C.: U.S. Government Printing Office, 1966), table 4, p. 27-6.

Note: No data are available for the city of Helena for 1967.



	Value Added by Manufacture	
	<u>Total</u>	<u>Average Per Production Worker</u>
Montana	\$236,230,000	\$14,751
Helena impact area	11,581,000	18,152
Lewis and Clark County	11,300,000	18,678
Helena	3,077,000	11,271

While the impact area and Lewis and Clark County accounted for very little of the total value added in the state, the value added per production worker for both areas compared very favorably in 1963; and in 1967, it looked even better for the county relative to the state average.<sup>56</sup>

	<u>Value Added Per Worker</u>
Montana	\$19,354
Lewis and Clark County	27,200

<sup>56</sup>U.S. Department of Commerce, *Summary of Manufacturing Statistics*, table 1, p. 27-4. Derived.



## HELENA AREA INFRASTRUCTURE

Infrastructure, as the term implies, is the basic facilities serving the area. Such facilities include the basic utilities facilities: water supply, sewage disposal, and electric power; educational facilities; medical and health facilities; and recreational and cultural facilities. Economic development of the Helena economic growth center, or of the two-county impact area as a whole, depends on the infrastructure as well as on the economic climate. The basic capacity of the infrastructure must be sufficient to adequately meet the growing needs of the area, or be able to expand as necessary. If it is not this capacity, or if it is unable to expand, it will constitute a severe constraint on local government and economic development. In general, the Helena area infrastructure seems to have such capability.

### Water Supply Situation

The city of Helena, with its approximately 23,000 residents, and the bulk of the commercial and industrial operations of the economy are dependent on the city water supply system.

The primary water source for the city is the Helena River, which flows through the city. The second source is the Helena Reservoir, located west of the city. The second source is the Helena Reservoir, located west of the city.

The city has a contract with the Bureau of Reclamation (the city has a contract with the Bureau of Reclamation) for the Helena Reservoir, which provides the city a supply of water from the Helena Reservoir.

The Helena Reservoir, located west of the city, is a large reservoir (with a capacity of 1,101) being commercial and residential income property.



accounts--and total water consumption during fiscal 1973 was more than 2.6 billion gallons.<sup>57</sup>

The water supply has generally been adequate except for peak use times during the summer, when it has been necessary to institute rationing. As a result of this as well as the inadequacies of some of the facilities and equipment, and the increased demand on water and sewage disposal services resulting from steady population growth, two bond issues were approved by Helena taxpayers in 1971 for improvements to the water and sewer systems.

The primary improvement planned under the water bond issue was the construction of a crosstown connector between the city's two reservoirs, the Malben Reservoir (east) and the Woolsten Reservoir (west). The connector has been completed, providing for water to be distributed throughout Helena from either part of the system; thus, a failure in any part of the system will not cause a water stoppage. Other water system improvements included replacement of the two deteriorated wooden transmission lines with new steel mains, and improvements to the water treatment plant of the Missouri River System to increase its average daily capacity from 6 million to 8 million gallons. Current water consumption averages about 7 million gallons daily, with the peak consumption level during the summer reaching as high as 15 million gallons. The previous overall water plant capacity had proven inadequate for summer usage; city officials are hopeful this will not be the case for the near future but will know better after this summer (1974), the first test of the increased plant capacity.<sup>58</sup>

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<sup>57</sup>Helena Water and Sewer Department, unpublished data (Helena, Montana, telephone interview).

<sup>58</sup>W. L. and D. A. Davidson, Inc., *Official Statement and Notice of Sale*, City of Helena Water System Bonds (Great Falls, Montana, 1971).





The sewer bond issue was intended almost entirely for the construction of a secondary sewage treatment plant, and some further sewer improvements are anticipated. The secondary treatment plant is currently under construction, and is about half done; when completed, it is anticipated that the plant will have a peak flow capacity of about 23 million gallons and an average daily capacity of about 4 million gallons. The primary treatment plant, at the present, has an average daily capacity of 6 million gallons, and the present load averages 3 million gallons daily, with a peak flow of 4 million gallons.<sup>59</sup>

According to the Department of Highways, Helena city officials expect the recently expanded water and sewerage facilities to be capable of serving about 35,000 people, and they have anticipated reaching this population by 1990.<sup>60</sup> Also, the U.S. Bureau of Reclamation's contract guaranteeing water to the city is considered by some to be sufficient to assure a plentiful supply for about the next forty years.<sup>61</sup>

The city of Townsend, in Broadwater County, also maintains a city water and sewerage system, but on a considerably smaller scale. Three underground wells provide water to an 180,000-gallon storage tank that has an estimated daily capacity of 2,000 gallons a minute. Current consumption has been estimated by city officials at an extremely high daily average of around 250 gallons per person or higher. As a result, in spite of the relatively recent addition of a new well, the existing facilities

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<sup>59</sup>Helena Sewage Treatment Plant, unpublished data (Helena, Montana), telephone interview.

<sup>60</sup>Montana Department of Highways, "Helena, Montana, An Economic Growth Center," p. 10.

<sup>61</sup>D.A. Davidson, Inc., *Official Statement and Notice of Sale*.



are inadequate to meet existing needs. The city's sewerage system is also not fully adequate, partly because of a groundwater problem. Sewage is collected within the town and pumped out to a lagoon-type wastewater stabilization pond. The problems come during the irrigation season, when the ground water enters the system, taxing the pumping system and putting unnecessary strain on the wastewater pond. The city is now in the process of applying to the U.S. Environmental Protection Agency for a grant (or grants) for water and sewer improvements primarily to increase the capacity of the water storage tank and improve the sewage treatment capabilities.<sup>62</sup>

Outside the Helena and Townsend city areas, many small communities have relied primarily on private individual wells for their water and individual cesspools and sewage tanks for sewage disposal. As the population, and thus the population density, increases in these areas (especially in those areas surrounding Helena), individual wells and sewerage facilities are becoming inadequate and community water and sewer systems will likely be necessary. A 1972 report by the Lewis and Clark County USDA Committee for Rural Development pinpointed such areas in the county as Lincoln, primarily, and York, Unionville, Colorado Gulch, and East Helena (areas surrounding Helena itself) as having had sufficient population growth (coupled with inadequate individual sewerage facilities or drainage) to make community water and/or sewage disposal systems either necessary, now or in the near future. The need to eliminate

<sup>62</sup> Mayor, City of Townsend, unpublished data (Townsend, Montana), telephone interview.



a potential pollution problem makes improved sewerage facilities especially necessary in East Helena.<sup>63</sup>

A similar report for Broadwater County noted that the Toston and Radersburg communities are able to obtain good quality water from individual private wells but that community water systems, similar to that in Townsend, would be feasible for these areas. Also, because the dump sites currently in use in the county do not conform to existing laws, the Broadwater County Committee for Rural Development feels that sanitary landfill areas will have to be established in the near future.<sup>64</sup>

Although many communities such as these, in both counties, may lack the means to plan and fund such systems, federal assistance sometimes can be obtained to help acquire the facilities.

#### Electric Power and Natural Gas

The primary supplier of electric power and natural gas service in the impact area is The Montana Power Company; in addition, the Vigilante Electric Co-op also provides some electric service to both counties. The Montana Power Company reported having 10,340 electric meters in Helena and about 1,400 in East Helena in late 1973; natural gas customers numbered about 8,600 in Helena and about 650 in East Helena.<sup>65</sup> In addition, Vigilante Electric Co-op reported a handful of accounts in Lewis and Clark County by the end of 1972 and over 450 in Broadwater County.<sup>66</sup> Unfortunately, data on electric

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<sup>63</sup>U.S. Department of Agriculture, Lewis and Clark County Committee for Rural Development, *Lewis and Clark County Affliction Statement*, 1979 (n.p., n.d.), pp. 7-9.

<sup>64</sup>U.S. Department of Agriculture, Broadwater County Committee for Rural Development, *Broadwater County Affliction Statement*, 1979 (n.p., n.d.), pp. 10-11.

<sup>65</sup>Helena Chamber of Commerce, "Facts About Helena, Montana."

<sup>66</sup>Vigilante Electric Co-op, Inc., unpublished data (Townsend, Montana).



power and natural gas consumption in the impact area could not be made available by the primary supplier in time for this report. However, unpublished data for Montana Power Company's entire Helena Division (which includes parts of Lewis and Clark, Powell, Jefferson, Broadwater and Meagher counties) indicate that residential consumption of electrical power in this area increased by 28 percent between 1970 and 1973 and commercial and industrial consumption, altogether, increased by almost one-fourth.<sup>67</sup> Since the parts of Lewis and Clark and Broadwater counties falling in this division make up a sizeable portion of the total and include the largest city, it would seem likely that the impact area's experience would parallel or exceed that of Montana Power Company's Helena Division as a whole.

#### Educational Facilities

Educational facilities serving the two-county impact area (as of October 1973) include twenty-five elementary schools (two fewer than in 1971), two public junior high schools, and four public high schools; there have been no accredited private elementary or secondary schools in the area since 1968. Most of these schools are, of course, located in Lewis and Clark County and in the city of Helena, where the bulk of the population is (table 55). There is also the Mountain View School for girls, a state institution located in Helena.

Altogether, an estimated 9,300 elementary and secondary students are enrolled in the thirty-one public schools in the entire impact area, with about 8,600 of the students enrolled in Lewis and Clark County's twenty-

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<sup>67</sup>The Montana Power Company, unpublished data (Butte, Montana).





Table 55

Educational Facilities in the Helena Impact Area  
Academic Years 1971-72, 1972-73, and 1973-74

	1971-72			1972-73			1973-74		
	Schools	Students	Certified Staff	Schools	Students	Certified Staff	Schools	Students	Certified Staff
Elementary schools	27	5,122	236	26	5,081	233	25	4,939	225
Lewis and Clark County	24	4,663	213	23	4,628	211	22	4,513	203
Helena	14	3,278	170	14	3,252	166	13	3,151	161
Broadwater County	3	459	23	3	453	22	3	423	22
Junior high schools									
Fall located in Helena	2	1,941	78	2	2,015	84	2	1,731	91
High schools	4	2,292	121	4	2,345	126	4	2,557	139
Lewis and Clark County	3	2,064	110	2	2,116	114	3	2,324	126
Helena	2	1,951	106	2	2,012	110	2	2,423	123
Broadwater County	1	228	11	1	233	12	1	233	13
Postsecondary institutions									
Helena Vocational-Technical Center	1	448	52	1	504	33	1	493 <sup>b</sup>	37
Carroll College, Helena	1	1,079	98	1	1,018	88	1	988	81

Source: Montana Superintendent of Public Instruction, Montana Statistical Abstract, 1971-72, through 1973-74, and unpublished data from the Helena Technical Center.

Notes: The Helena impact area includes Lewis and Clark and Broadwater counties. The data are as of October 1 (1971, 1972, and 1973) for all the elementary and secondary schools. Enrollment data for the Helena Technical Center are estimates of enrollment during the academic year, because of the varying lengths of the different programs offered; the other data are as of October 1. Carroll College lists 973-74 as the end of the fifth year of the fall term.

a. Includes teachers, principal, supervisor, librarians, counselors, instructional supervisors, staff, and administrative assistants for all the public institutions and all public and part-time faculty and other professional staff for Carroll College.

b. As of January 31, 1974.



seven public schools. State-certified personnel serving the schools number 455; besides teachers, the certified staff includes principals, superintendents, librarians, counselors, supervisory instructional staff, and administrative assistants. Thus, overall the ratio of students to professional staff is about 20 to 1; the student-teacher ratio then would be slightly higher (table 55).

Total elementary and secondary enrollment in the impact area increased between 1968 and 1972; however, the 1973 data indicate a slight decline in enrollment (table 56). A look at the trend in births for the area provides the reason: since the early sixties, births in the entire impact area, and in Lewis and Clark County, have been declining (see figure 3). The same trend, of course, is being experienced in the state as a whole, as well as throughout the United States. This suggests that natural increase is playing a lesser role in the area's population growth than it was earlier, and the effects of declining births can be readily seen in the enrollment figures--e.g., children born between 1962 and 1967 (when births were declining) would, for the most part, be in the elementary grades around 1973, and, as the data in table 55 indicate, the enrollments in the elementary schools have been declining recently. Enrollments in the junior high schools have also started to decline, and a greater impact will be seen as more of the elementary age students move up into the secondary grades.

It is not likely that any major enrollment growth will be seen by 1980 unless there is a sizeable increase between now and then in the number of immigrants with school age children--those enrolled in 1980 would have been born between 1963 and 1973, and resident births have continued to decline, overall, through 1973.



Table 56  
Total Elementary and Secondary School Enrollment  
in the Helena Impact Area  
1968-1973

	<u>1968</u>	<u>1969</u>	<u>1970</u>	<u>1971</u>	<u>1972</u>	<u>1973</u>
Helena impact area	8,148	9,167	9,348	9,355	9,445	9,277
Lewis and Clark County	7,462	8,471	8,651	8,668	8,759	8,615
Helena	6,100	7,009	7,184	7,170	7,279	7,161
Broadwater County	686	696	697	687	686	662

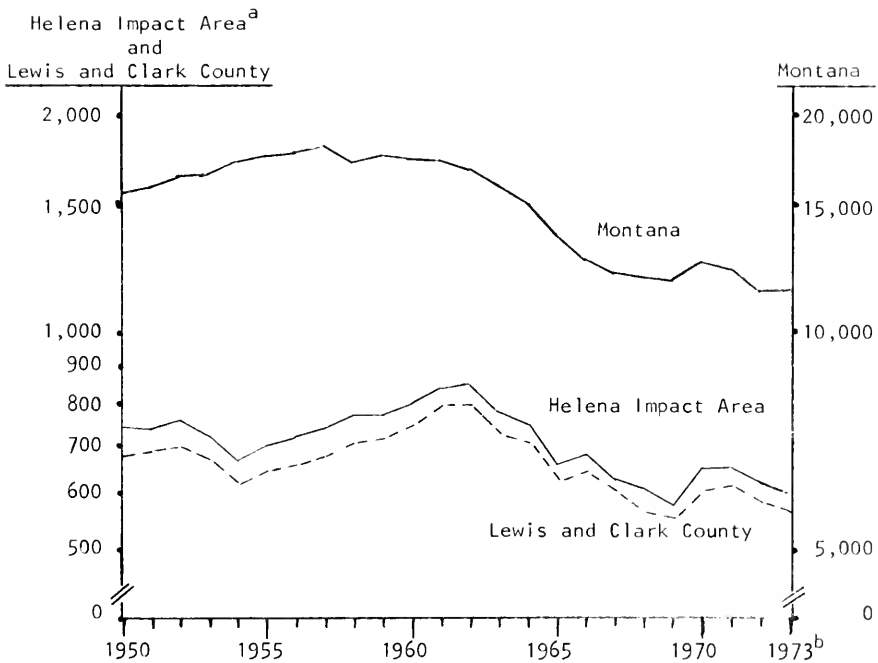
Source: Montana Superintendant of Public Instruction, unpublished data (Helena, Montana).

Note: These data represent the total number of students enrolled as of October 1 of each year and include regular as well as ungraded and special students in grades kindergarten through twelve.



Figure 3

Live Births in Montana, the Helena Impact Area,  
and Lewis and Clark County  
1950-1973



Sources: Montana State Board of Health, *Biennial Reports*, 1950-1953; *idem*, *Annual Statistical Supplements*, 1954-1965; Montana State Department of Health, *Annual Statistical Supplements*, 1966-1969; Montana Department of Health and Environmental Sciences, *Montana Vital Statistics*, 1960-1971; and *idem*, unpublished data (Helena, Montana).

Note: The data relate to births by place of residence.

<sup>a</sup>The Helena impact area includes Lewis and Clark and Broadwater counties.

<sup>b</sup>Preliminary.





In addition to the elementary and secondary schools, there are also two postsecondary institutions in the impact area, both in Helena: the public vocational-technical center, which currently has about 490 students; and a private four-year college (Carroll College) which has about 1,100 students enrolled (table 55).

#### Medical and Health Facilities

Four hospitals currently serve the impact area, three in Lewis and Clark County and one in Broadwater County. One of these, the Veterans Administration Hospital located just three miles west of Helena at Fort Harrison, serves Montana veterans, providing hospitalization and out-patient and dental care. It accounts for 160 of the total 329 hospital beds in the impact area (as of January 1974), 54 of the nurses, and 59 of the ancillary personnel (pharmacists, technicians, therapists, aides and orderlies, etc.); in addition, there are 17 physicians and 2 dentists on the staff.<sup>68</sup> The other three hospitals in the area--Montana Children's Home and Hospital and St. Peter's Community Hospital in Helena, and Broadwater Hospital in Townsend--account for the other 169 beds and the other 375 medical personnel employed. St. Peter's serves the bulk of the community, providing 111 beds at the present, although it has received a temporary variance to add 33 more beds if necessary and is currently remodeling the obstetrics-nursery section to provide an additional 10-12 beds. Some of this expansion is the result of the closure of St. John's Hospital in 1973, but any significant expansion will depend on occupancy over time. An apparent oversupply of hospital facilities in the Helena

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<sup>68</sup>Veterans Administration Hospital, unpublished data (Fort Harrison, Montana).



area evidently had something to do with the closure of St. John's. St. Peter's has not yet felt any pressure on its facilities; it has, however, added about 100 more personnel since the closure of St. John's, with 80 of the additional medical personnel, mostly nurses, coming from St. John's.<sup>69</sup> Altogether there are well over 450 medical personnel (excluding doctors) staffing the area's four hospitals; and there are some 329 hospital beds currently available, or about 86 for every 10,000 residents in the impact area and in Lewis and Clark County (based on data in tables 1 and 57). This speaks favorably for the two-county impact area in comparison with the state as a whole, for example, or even with the entire United States: the most recent data available (1971) indicate that there are about 70 hospital beds for every 10,000 Montanans, and roughly 73 beds for every 10,000 residents in the entire United States.<sup>70</sup>

There are also several medical and chiropractic clinics and a mental health clinic in the area, all of which are in Helena; two nursing homes (a third, located in Alhambra in Jefferson County, is only a few miles outside of Helena); and a number of other private homes and institutions--Deaconess Home for Children, Masonic Home of Montana, Odd Fellows Home, Florence Crittendon Home, and Penkay Eagles Manor.

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<sup>69</sup>Montana Children's Home and Hospital and St. Peter's Community Hospital, unpublished data (Helena, Montana); and Broadwater Hospital, unpublished data (Townsend, Montana).

<sup>70</sup>U.S. Department of Health, Education, and Welfare, Public Health Service, *Health Resources Statistics*, 1972-73 (Washington, D.C.: U.S. Government Printing Office, 1973), table 201, p. 363; U.S. Department of Commerce, Bureau of the Census, "Estimates of the Population of the United States to November 1, 1973," *Current Population Reports*, Series P-25, no. 510 (Washington, D.C., 1973); and *idem*, "Estimates of the Population of Montana Counties, July 1, 1971 and July 1, 1972," p. 2. Derived.



Table 57

Medical and Health Facilities and Services  
Helena Impact Area and Lewis and Clark County

	Helena Impact Area <sup>a</sup>	Lewis and Clark County
Hospital facilities <sup>b</sup>	4	3
Beds available	329	306
Medical personnel employed <sup>c</sup>	488	458
Nurses <sup>d</sup>	303	303
Ancillary personnel <sup>e</sup>	185	155
Clinics <sup>f</sup>	9	9
Physician-surgeon clinics	7	7
Chiropractic clinics	1	1
Mental health clinics	1	1
Medical practitioners <sup>f</sup>	81	77
Physicians and surgeons	48	45
Osteopathic physicians	2	2
Dentists and orthodontists	20	19
Optometrists	6	6
Chiropractors	2	2
Veterinarians	3	3
Nursing homes <sup>f</sup>	2	2

Sources: Montana Children's Home and Hospital and St. Peter's Community Hospital, unpublished data (Helena, Montana); Veterans Administration Hospital, unpublished data (Fort Harrison, Montana); Broadwater Hospital, unpublished data (Townsend, Montana); and Mountain Bell Telephone Company, Helena Telephone Directory (March 1973).

<sup>a</sup>The Helena impact area includes Lewis and Clark and Broadwater counties.

<sup>b</sup>As of January 1974. Includes Montana Children's Home and Hospital and St. Peter's Community Hospital in Helena, the Veterans Administration Hospital in Fort Harrison, and Broadwater Hospital in Townsend.

<sup>c</sup>Includes full- and part-time personnel.

<sup>d</sup>Includes registered and licensed practical nurses; figure is an estimate because one hospital (St. Peter's) included aides and orderlies and no detail was available for Broadwater.

<sup>e</sup>Includes pharmacists, technicians, therapists, aides and orderlies, etc.; in some instances, cooks and other nonmedical personnel are also included. All Broadwater Hospital personnel are included because no detail is available.

<sup>f</sup>As of March 1973.



Medical practitioners in the area include 48 physicians and surgeons (doctors of medicine) and 2 osteopathic physicians (doctors of oestopathy), as well as 20 dentists--or about 13 physicians, altogether, and 5 dentists for every 10,000 residents (tables 1 and 57). These ratios compare much more closely with those for Montana--11 physicians and 5 dentists for every 10,000 residents (in 1971)--but the situation is somewhat better in the United States as a whole, where there were more physicians (16) and as many dentists (5) per 10,000 residents.<sup>71</sup> In addition there are also several optometrists, chiropractors, and veterinarians in the area (table 57).

We have indicated that most of the medical facilities and personnel in the impact area are located in Helena. Residents of the Helena area would appear to have available a relatively wide range and good quantity of medical- and health-related services. Although Broadwater County residents have fewer such services immediately available within the county, Helena facilities are quite accessible. Residents of the rural areas north of Helena in Lewis and Clark County, for example, Lincoln, are not so fortunate and are far removed from adequate facilities.

#### Recreational and Cultural Facilities

Recreational and cultural facilities in the impact area, especially Lewis and Clark County, are numerous and varied and serve to enhance the area's attractiveness to both residents and visitors.

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<sup>71</sup>U.S. Department of Health, Education, and Welfare, *Health Resources Statistics*, tables 42 and 91, pp. 95 and 188; U.S. Department of Commerce, "Estimates of the Population of the United States to November 1, 1973,"; and *idem*, "Estimates of the Population of Montana Counties, July 1, 1971 and July 1, 1972," p. 2. Derived.





Outdoor recreation facilities abound in the area. They include numerous campgrounds that provide varying activities, equipment, and services for their visitors (table 58). Many of these are located near Lincoln in Lewis and Clark County. There are also several other recreational and resort areas, an established ski area, and numerous points of interest. Some of the more prominent recreation areas and tourist attractions outside Helena are: the Gates of the Mountains, a scenic six-mile river gorge that is the most heavily visited area in the Holter Lake recreation area, which includes the 28,000 acres of the Gates of the Mountains Wilderness; the Canyon Ferry Recreation Area eighteen miles east of Helena, which offers boating, fishing, and water sports; the Lincoln Backcountry, a 75,000 acre area in the northern portion of Lewis and Clark County; and Frontier Town, a replica of an old frontier fort, on McDonald Pass.

Helena's primary recreational facilities include two golf courses and twenty-four parks which total about 145 acres and provide playground equipment, tennis courts, ball fields, and a swimming pool. There are also two drive-in movie theatres, with a capacity for 1,000 cars; an indoor theatre seating over 600; and a civic center with an auditorium seating 2,500 people. Principal attractions in Helena are the historic state capitol building with its priceless twenty-five foot Charles M. Russell painting in the House of Representatives chamber; and the Pioneer-Memorial building which houses the Montana Historical Society library and museum, the \$2 million Charles M. Russell collection, and the Towe antique Ford collection. There is also Reeder's Alley, a group of arts and crafts studios and a restaurant housed in restored red brick miners' cabins, which is open during the summer.



Table 58

Outdoor Recreational Facilities in the Helena Impact Area,  
by County, 1973

Campgrounds and facilities

Lewis and Clark County

Aspen Grove, east of Lincoln; drinking water, stoves, tables, and sanitary facilities.

Beartooth State Recreation Area, south of Craig on Holter Lake; drinking water, stoves, tables, sanitary facilities, fishing, boating, and boat ramps.

Benchmark, west of Augusta at northwest end of Wood Lake; drinking water, stoves, tables, sanitary facilities, and fishing.

Canyon Ferry Recreation Area, east of Helena and south of Canyon Ferry; drinking water, stoves, tables, sanitary facilities, fishing, boating, swimming, and boat ramps.

Copper Creek, northeast of Lincoln; drinking water, stoves, tables, sanitary facilities, and fishing.

Holter Lake Recreation Area, south of Craig; drinking water, stoves, tables, sanitary facilities, fishing, boating, swimming, and boat ramps.

Home Gulch, east of Gibson Dam, northwest of Augusta; drinking water, stoves, tables, and sanitary facilities.

Hooper State Recreation Area, east of Lincoln; drinking water, stoves, tables, and sanitary facilities.

Moose Creek, west of Rimini; drinking water, stoves, tables, and sanitary facilities.

Porcupine, west of Rimini; drinking water, stoves, tables, and sanitary facilities.

Vigilante, northeast of Canyon Ferry in the Helena National Forest; drinking water, stoves, tables, and sanitary facilities.

Wood Lake, west of Augusta; drinking water, stoves, tables, sanitary facilities, and fishing.



Broadwater County

Deepdale, four miles south of Townsend; stoves, tables, sanitary facilities, fishing, and boat ramps.

Missouri River, five miles south of Townsend; fishing.

Missouri River Headwaters State Monument, north of Three Forks; drinking water, stoves, tables, sanitary facilities, fishing, boating, and boat ramps.

Skidway, east of Townsend in the Helena National Forest; drinking water, stoves, tables, and sanitary facilities.

Areas with minimal camping facilitiesLewis and Clark County

Bean Lake, twelve miles west of Augusta; stoves, tables, sanitary facilities, fishing, and boat ramps.

Campground between Willow Creek Reservoir and Nilon Reservoir, northwest of Augusta.

Hauser Lake, west of Canyon Ferry; boat ramps.

Lincoln, on Highway 200 west of Lincoln.

Sun River, northwest of Augusta.

Willow Creek Reservoir, north of Augusta; boat ramps.

Resorts and other recreation areasLewis and Clark County

Belmont Ski Area, twenty-five miles northwest of Helena; two chalets (no overnight accommodations), snack bar, ski school, pomalift, rope tows, twenty-five meter jump, and ski patrol.

K Lazy 3 Guest Ranch, Lincoln, in the Lincoln Scapegoat area.

Seven-up Guest Ranch, Lincoln.

V Bar A Guest Ranch, Lincoln.

Broadwater County

Grass Mountain Ski Area, twenty-three miles east of Townsend and twenty-one miles southwest of White Sulphur Springs; chalet (no overnight accommodations), snack bar, cable bar lift, rope tow, twenty-meter jump, cross-country touring, and ski patrol.



Museums and points of interestLewis and Clark County

Frontier Town, fifteen miles west of Helena on U.S. 12 at MacDonald Pass.

Gates of the Mountains, south of Wolf Creek; boat trips.

Montana Historical Library and Museum, Helena.

Pioneer Cabin, Helena.

Source: Montana Department of Highways, *Montana, The Big Sky Country*, 1973 (Helena, Montana).





The Historical Society library, considered to be the most extensive collection of Montana materials, has around 50,000 volumes. Helena's one city library has about 72,000 volumes and the State Library, also in Helena, houses some 144,000 volumes. In addition, an extensive 60,000-volume law library is housed in the state capitol building.<sup>72</sup>

Like most rural areas, Lewis and Clark County outside Helena and Broadwater County provides few amenities in the way of libraries, art, and so forth. They are, of course, blessed with beautiful scenery and varied outdoor recreational opportunities.

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<sup>72</sup>Helena Chamber of Commerce, "Facts About Helena, Montana."



## WHAT 1980 MAY BRING

Nineteen eighty is less than six years away; nevertheless, projecting what the population, employment, and personal income of the impact area will be then is full of hazards. What we shall do is set down what seems to be the most likely course of the area's economy between 1974 and 1980. Our area projections will be set within the framework of the state projections which appear in the Montana Economic Study, published by the Bureau of Business and Economic Research in June 1970.<sup>73</sup> Although they are four years old, we believe those projections still are useful; nothing has happened since they were prepared which would cause us to make significant changes in the overall analysis or in the forecasts which appear there.

### Population and Employment

Our projections show population and employment in the Helena impact area continuing to grow during the 1970s, although more slowly than during the sixties. We see 1980 population in the area at approximately 39,400, 10 percent higher than in 1970 (table 59). No separate projections were made by county, but the assumption is that most of the population growth will take place in Lewis and Clark County and the Helena area.

The assumptions involved in this population projection include:

- 1) declining birth rates, which if carried to the year 2020 would result in a net reproduction rate of 2.1 children per female;

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<sup>73</sup>University of Montana, Bureau of Business and Economic Research, "The Montana Economy," *Research Report of the Montana Economic Study*, pt. 1, vol. 2, chap. 4 (Missoula, Montana, 1970).



Table 59

Resident Population and Civilian Labor Force  
in the Helena Impact Area  
1960, 1970, and Projected 1980

	<u>Percent Change</u>	
	<u>1960-1970</u>	<u>1970-1980<sup>b</sup></u>
	<u>1960</u>	<u>1970</u>
Resident population	30,810	35,807
	39,420	16.2
		10.1
Total labor force	13,390	15,997
		19.5
		16.4
Civilian labor force	13,362	15,956
		19.4
		16.4
Employed	12,715	15,147
		19.1
		16.5
Unemployed	647	809
		25.0
		14.8
<i>Percentage of civilian</i>		
<i>labor force</i>	4.8	5.1
		4.9
		--

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1960, General Social and Economic Characteristics, Montana*, PC(1)-28C (Washington, D.C.: U.S. Government Printing Office, 1961), table 85, pp. 28-146 and 28-148; and *idem*, *U.S. Census of Population: 1970, Characteristics of the Population, Montana*, vol. 1, pt. 28 (Washington, D.C.: U.S. Government Printing Office, 1973), tables 9, 35, and 121, pp. 28-12, 28-66, 28-72, 28-206, and 28-208. Derived. The projected 1980 estimates were developed by the University of Montana Bureau of Business and Economic Research (Missoula, Montana).

Note: The labor force data relate to persons fourteen years of age and over.

<sup>a</sup>Rounded to the nearest ten persons.

<sup>b</sup>Derived using the original unrounded data for 1980.



- 2) net migration into the area at the same rate as between 1960 and 1970, with the age distribution approximately the same;
- 3) the same labor force participation rate for males in 1980 as in 1970, but a slight increase in the female participation rate;
- 4) unemployment equal to about 5 percent of the labor force; and
- 5) a 16 percent increase in total employment over the decade of the 1970s.

We expect population in the Helena impact area to increase because we expect a substantial number of new jobs in the area. The employed civilian labor force in 1980 may exceed 17,600; this would mean 2,500 more jobs than in 1970. It would represent a slower growth in jobs than during the 1960s, but still a respectable increase (table 59). The 1.5 percent projected annual growth rate in employment in the two-county area (table 60) may be compared to an 0.8 percent annual rate projected for the state as a whole by the Montana Economic Study.<sup>74</sup> Thus the Helena area is expected to continue in its role as one of the faster growing areas in Montana.

Table 60 shows projected employment in 1980 by major industry. We reiterate that projections are subject to considerable error and that we would be very surprised if these figures turned out to be right on the nose. They represent what we see as the most likely developments, given past trends and what we know about present and future developments.

A glance at table 60 will show that of those industries defined as export or growth industries in the area--government, agriculture, mining, manufacturing, and railroads--only government is expected to expand its

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<sup>74</sup> *Ibid.*, table 4.4, p. 4.15.





Table 60

Civilian Employed Labor Force, By Industry, in the Helena Impact Area  
1960, 1970, and Projected 1980

Industry	Employment		Change in Number of Workers		Average Annual Rate of Change (in percentages) 1960-1970 1970-1980 1960-1980
	1960	1970	1960-1970	1970-1980	
Agriculture, forestry and fisheries	1,098	995	-103	-64	-1.0
Mining	112	88	-24	-18	-2.2
Construction	1,031	1,370	339	--	2.6
Manufacturing	1,039	906	-133	-81	-1.4
Transportation, communications, and public utilities	1,157	1,135	-22	-45	-0.4
Trade, services, and finance	5,891	7,499	1,608	2,392	2.6
Government	2,164	2,914	750	325	1.1
Other	223	240	17	--	--
Total employed	12,715	15,147	2,432	2,509	1.8

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Economic Activity, 1960*, vol. 1, *U.S. Government Printing Office, 1961*, table B5, pp. 28-146 and 28-148; and *U.S. Bureau of Economic Activity, 1970*, *U.S. Government Printing Office, 1973*, table 123, pp. 28-216 and 28-218. The projected 1980 estimates were developed by the University of Montana Bureau of Business and Economic Research (Missoula, Montana).

Note: The data relate to persons fourteen years of age and over.

<sup>a</sup>Rounded to the nearest ten persons, thus the detail does not add to the total.

<sup>b</sup>Derived using the original unrounded data for 1980.



employment between 1970 and 1980. We expect agricultural employment to continue to decline, but at a slower rate than during the sixties. Mining employment is not very important in terms of numbers, and we see a further loss of jobs in that industry. The Montana Economic Study suggested that a new copper mine in the Lincoln area might be put into operation during the 1970s; this now seems unlikely. Within the manufacturing group, most of the decline will occur in wood products activities. We are assuming that the ASARCO operations at East Helena continue; if they should close, manufacturing employment could decline by another 300 workers.<sup>75</sup>

Unless some new and presently unforeseen development in mining or manufacturing should occur, then, the Helena area is left with government as its major growth industry. We expect government employment to grow more slowly between now and 1980 than it did between 1960 and 1970. One reason is that school enrollments are declining and the public schools are not expected to increase the number of their personnel much during coming years; at the same time, only a moderate increase is expected in state government employment.

Among the area's secondary industries, we see a continued small decline in employment in the transportation and utilities industries, and, taking the easy way out, we assumed that employment in the highly cyclical construction industry would be the same in 1980 as in 1970. In an area as small as this, one large construction project could make this prediction quite inaccurate.

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<sup>75</sup> Department of Intergovernmental Relations, Division of Research and Information Systems, *The Economic Impact of the East Helena Smelter*, Special Report PI103 (Helena, Montana, January 1974), p. 10.



Nearly all the new jobs in the Helena impact area between 1970 and 1980 will be in trade, services, and finance. A rapid increase in employment in these industries between 1970 and 1972 adds evidence to this prediction. Annual rather than biennial sessions of the legislature, increased citizen participation in state government, and the normal increase in tourist travel should contribute to continued growth. Indeed, improved highway access to Helena may contribute to a greater-than-normal increase in tourist travel, although the city still must compete with Butte for east-west travelers. It is worth repeating that a good share of the trade and service activities in Helena are travel-oriented and that businesses catering to travelers do constitute an export industry, bringing outside revenue into the area.

#### Unemployment

Unemployment in the Helena area, as we noted earlier, is expected to remain at around 5 percent of the labor force, approximately the same proportion as reported for the two counties by the 1960 and 1970 censuses.

#### Income and Earnings<sup>76</sup>

Our income projections are based on the employment projections in tables 59 and 60 and on assumptions used in the Montana Economic Study; they are expressed in 1967 dollars. We expect that between 1970 and 1980 total personal income in the impact area may increase at an average rate of approximately 3.7 percent per year, slightly faster than between 1959

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<sup>76</sup>Earnings is also called participation income (the term used in this section) because it refers to income derived from direct participation in the labor force; it includes wages and salaries, proprietors' income, and other labor income (fringe benefits).



and 1970, and may approach \$177 million in 1980 (table 61). Per capita income may amount to \$4,490 in 1980; this represents an average annual increase of 2.7 percent.

In estimating income, we used Montana Economic Study assumptions that participation income (or earnings) per agricultural worker, in constant dollars, would not change between 1970 and 1980. We assumed that nonagricultural participation income would increase at an average rate of 1.9 percent per year (table 62). Participation income per worker was converted to a per capita basis, and per capita estimates of property income, transfer payments, and social security contributions were derived using annual rates of increase from the Montana Economic Study (see table 63). Per capita estimates of participation income, plus property income and transfer payments, less social contributions, equals total per capita income. The estimate for 1980 (in constant 1967 dollars) is about \$4,490. That figure was multiplied by the projected 1980 population to obtain estimated total personal income (\$177 million).

Once again, all of these projections--population, employment, and income--assume a more rapid growth during the 1970s in the impact area than in the state as a whole.

### Highway Traffic

Counts by the Montana Department of Highways indicate that traffic on Highway 12 has increased steadily since 1951 (table 28). Figures for 1970 through 1972 indicate that the rate of increase is accelerating. We have already commented on the rapid growth of travel-oriented trade and service industries in Helena in recent years.

The projections for population, employment, and income in 1980 reflect the past growth in travel-related activities and therefore in-





Table 61

Total Personal Income and Per Capita Personal Income  
in the Helena Impact Area  
1959, 1970, and Projected 1980

	Total Personal Income (\$000)	Per Capita Personal Income
<hr/>		
In 1967 dollars		
1959	\$ 85,708	\$2,784
1970	123,529	3,449
Projected 1980 <sup>a</sup>	177,000	4,490
 <i>Average annual rate of change (in percentages)</i>		
1959 - 1970	3.4	2.0
1970 - 1980 <sup>b</sup>	3.7	2.7

Sources: U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, Regional Economics Information System, unpublished data (Washington, D.C., August 1973). Derived. The projected 1980 estimates were developed by the University of Montana Bureau of Business and Economic Research (Missoula, Montana). Adjusted to constant (1967) dollars using the Consumer Price Index.

<sup>a</sup>Rounded to the nearest \$10,000 (total) or nearest \$10 (per capita).

<sup>b</sup>Derived using the original unrounded data for 1980.



Table 62

Participation Income per Worker, in the Helena Impact Area  
1959, 1970, and Projected 1980

(In 1967 Dollars)

	1959	1970	Projected 1980 <sup>a</sup>	Average Annual Rate of Change (In Percentages)	
				1959-1970	1970-1980 <sup>b</sup>
Agricultural participation income per worker	\$6,258	\$6,113	\$6,110	-0.2	--
Nonagricultural participation income per worker	5,351	6,353	7,670	1.7	1.9
Total participation income per worker	5,426	6,340	7,590	1.4	1.9
Ratio of employment to population	0.413	0.423	0.448		
Participation income per capita	2,241	2,682	3,400	1.6	2.4

Sources: U.S. Department of Commerce, Bureau of the Census, *U.S. Census of Population: 1980, General Social and Economic Statistics, Montana*, PC(1)-280 (Washington, D.C.: U.S. Government Printing Office, 1961), table 85, pp. 28-146 and 28-148, *idem*, *U.S. Census of Population: 1970, Characteristics of the Population, Montana*, vol. 1, pt. 28 (Washington, D.C.: U.S. Government Printing Office, 1973), tables 10, 121, and 123, pp. 28-13, 28-14, 28-206, 28-208, 28-216, and 28-218; and *idem*, *Social and Economic Statistics Administration, Bureau of Economic Analysis, Regional Economics Information System*, unpubl. shed data (Washington, D.C., August 1973). Derived. The projected 1980 estimates were developed by the University of Montana, Bureau of Business and Economic Research and are based on *idem*, "The Montana Economy," *Research Report of the Montana Economic Study*, pt. 1, vol. 2, chap. 4 (Missoula, Montana, 1970). Adjusted to constant (1967) dollars by using the Consumer Price Index.

Note: Participation income is the same as earnings and includes wages and salaries, other labor income, and proprietors' income.

<sup>a</sup>The income estimates have been rounded to the nearest \$10.

<sup>b</sup>Derived using the original unrounded data for 1980.



Table 63

Per Capita Personal Income, by Type, in the Helena Impact Area  
1959, 1970, and Projected 1980

(In 1967 Dollars)

	1959	1970	Projected 1980 <sup>a</sup>	Rate of Change in Per Capita Income 1959-1970	Rate of Change in Per Capita Income 1970-1980 <sup>b</sup>
Per capita amounts of:					
Participation income (earnings)	\$2,241	\$2,682	\$3,400	21.1	26.4
Property income	405	545	770	35.8	41.4
Transfer payments	207	352	530	68.1	51.2
Less: personal contributions for social insurance	(69)	(134)	(210)	62.2	51.1
Total per capita income	2,784	3,445	4,490	23.9	30.2

Sources: U.S. Department of Commerce, Social and Economic Statistics Administration, Bureau of Economic Analysis, Regional  
Economic Information System, unpublished data (Washington, D.C., August 1977). <sup>a</sup>Derived from projected 1980 national data  
developed by the University of Montana Bureau of Business and Economic Research (Missoula, Montana) adjusted to local cost (1967)  
dollars using the Consumer Price Index.

Notes: Participation income includes wages and salaries, other labor income, and proprietors' income; property income is rent,  
dividends, and interest. Transfer payments include Social Security and other retirement benefits, relief to veterans' payments,  
etc.

<sup>a</sup>Rounded to the nearest \$10.

<sup>b</sup>Derived using the national unrounded data for 1980.



directly the increase in automobile travel. Implicit in the projections is the assumption that the number of persons traveling to the Helena area will continue to increase during the decade. The present (early 1974) situation with respect to gasoline supplies creates some uncertainty with respect to this assumption. Since we have no information on which to project reduced supplies of gasoline, we have assumed that fuel will not be a limiting factor in automobile travel. Furthermore, we assume that most travel to Helena is business travel and that it is more likely to continue unrestrained than travel for pleasure.

#### Potential Effects on Basic Infrastructure

The growth projected for the Helena area during the next six years is a moderate and gradual growth. It should not create many new problems, but it may add to those that already exist--especially to water and sewage problems in areas outside and adjacent to the city of Helena. Unless adequate facilities are provided, the time will come when further development in some areas will have to be restricted.

In the past, Helena's municipal water and sewer system has had problems in providing adequate services. A recent expansion presumably has solved these difficulties. As we noted earlier, the expanded facilities are designed to serve 35,000 people--a population which Helena will not reach during the 1970s.

Other services, such as electric power and gas, would appear to be sufficient, although the Helena area will be affected by the same supply factors which exist throughout the Montana Power Company service area.

Most educational facilities should be adequate; the decline in birth rates since the early sixties coupled with only a small anticipated net immigration should keep public school enrollments down. One exception





is the vocational-technical center which serves students from throughout Montana. With the demand for vocational education growing, this center may find itself overburdened. This would seem to be a state rather than a local problem.

Medical and health facilities may continue to be inadequate in some rural areas, but in the Helena and Townsend areas, where most of the population growth is likely to occur, there should be no problem.

Although the demand for recreational and cultural facilities no doubt will grow with the increase in population, Helena as the growth center would seem fairly well endowed and capable of providing adequate opportunities to its residents. The rural areas will continue to find it difficult to provide such amenities for their sparse population.



## SUMMARY

During the last decade or so, the Helena impact area has experienced relatively greater growth overall than most other areas of the state, or than the state itself. Resident population in the impact area has increased faster, and it was one of only a handful of areas in the state to experience net immigration during the sixties. The impact area's labor force has also shown more rapid growth. For example, in 1970 Lewis and Clark County recorded the third lowest ratio of nonworkers to workers among the fifty-six counties. Much of the growth resulted from the increased participation of women in the labor force: in 1970 Lewis and Clark County recorded the highest participation rate for women, and thus the rate for the impact area is also relatively high. Employment in the area has likewise recorded substantial overall growth. While some primary industries have shown declines since 1960, the significant employment growth in government (the predominant activity, and the one which has made Helena a growth center) and in trade, services, and finance (secondary industries) has generated the overall employment growth in the impact area. At the same time, unemployment, which has also increased, still is significantly lower than in the state as a whole.

Changes in earnings (or participation income) by industry closely follow employment changes. Thus, government, trade, and services generated most of the dollar increase in total earnings for the impact area between 1950 and 1970. And while earnings did not grow as fast as did property income and transfer payments, they did account for the bulk of the growth in total personal income in the impact area. By state



standards, the impact area's total personal income showed more rapid growth between 1950 and 1970, especially during the latter sixties.

Projections to 1980 suggest continued overall growth in population, employment, and income and earnings. Such growth, however, is expected to be more moderate than that experienced during the sixties.

Because of declining births, and the assumption that birth rates will not increase in the near future, net immigration will likely play a greater role in population growth in the seventies than was the case during the previous decades. Resident population is expected to increase because a substantial number of new jobs are expected in the impact area. Although growth in the number of jobs may be somewhat slower than during the sixties, the pattern among the various industries is not expected to differ considerably. Government (among the primary or growth industries) will see some expansion, but nearly all the new jobs are expected to be in trade, services, and finance (secondary industries). Likewise, with the anticipated increase in jobs, total income and earnings are expected to show continued growth during the seventies. Although the growth in population, employment, and income is expected to be more moderate during the seventies than during the sixties, the impact area's growth is still expected to be somewhat more rapid than that of the state as a whole.

Helena, as the focal point of the impact area, has relatively good access to most major Montana cities, but the dependence on the highways is readily apparent. Both east-west and north-south air service is available out of Helena, but the closest passenger rail service is available at Butte (outside the impact area); and bus service, though available, is not very convenient. Highway access, however, is relatively



convenient since Helena serves as a point of intersection in a major road network. North-south access is provided primarily by U.S. 91-Interstate 15; and east-west access is primarily by U.S. 12 and 287, while U.S. 287 also connects with Interstate 90 to provide further east-west access. The traffic flow along U.S. 12 east and west of Helena (the highway section most in need of improvement and reconstruction) has shown continued growth through 1972, in many cases twice what it was roughly twenty years earlier. This increased traffic volume and the increased reliance on automobile travel further supports the need to update obsolete sections of U.S. 12, especially since we expect highway traffic to and from Helena to continue unrestrained.

The Helena area infrastructure appears to be capable, overall, of meeting the current demands of the impact area. The moderate and gradual growth expected for the Helena area between now and 1980 should not create any new problems but may add to existing ones.

The city of Helena is served by a recently improved municipal water and sewerage system; these recent improvements have presumably taken care of any past difficulties with full service. Townsend's smaller-scale city water and sewerage system is in much need of improvement to adequately serve that city's residents. Outside these areas, private individual wells and individual cesspools and sewage tanks predominate, with many communities reaching the point where municipal systems may be feasible. Continued growth in such areas would reinforce the need to provide adequate facilities.

Electric power and natural gas services, supplied primarily by the Montana Power Company, appear to be sufficient to meet current needs in the impact area, and probably will be able to meet its future demands.





Supply factors existing throughout Montana Power's service area, however, also affect the impact area.

Educational facilities include a full range of schools--public elementary, junior high, and high schools, as well as a vocational-technical center and a private four-year college. Enrollment in the public schools has been declining recently as a result of declining births in the area (a trend being seen in the entire state and throughout the United States), and this enrollment trend can probably be expected to continue through the seventies. The increasing demand for postsecondary vocational education, however, could put excessive pressure on the state's Helena vocational-technical center to provide such service.

Medical and health services and facilities in the impact area cover a nearly full range of services. Basic hospital facilities (e.g., beds) and medical services (e.g., physicians and dentists) are in apparently good supply in the area, especially in comparison with the state as a whole or even with the entire United States. Accessibility to such services in the outlying rural areas north of Helena is inadequate, however, because most of the facilities and services are located in Helena and Townsend. On the other hand, there should be no significant problem in meeting the needs of the increased population since most of the population growth is expected to occur in the Helena and Townsend areas.

Recreational and cultural facilities, also a part of the infrastructure, provide many opportunities to the residents of the impact area. Helena, as the growth center, is particularly well endowed and should be able to adequately meet the increased demands that will come with the expected population growth. While the many other rural areas may continue to have difficulties providing such amenities, outdoor recreation opportunities of varying types abound throughout the impact area.





